

# **STRATEGIC PLANNING AND THE MARKETING MANAGER: RAMIFICATIONS OF A PHENOMENOLOGICAL PERSPECTIVE**

BARRY CHARLES ARDLEY

PhD  
GRADUATE BUSINESS SCHOOL  
De MONTFORT UNIVERSITY

JUNE 2002

## **ABSTRACT**

An extensive review of the literature on marketing planning reveals that the manner in which it is carried out in practice does not appear to reflect the way in which it is written about in texts. Some studies indicate that the linear step by step approach to strategic marketing planning is rarely used in practice. Other research points to significant problems existing with regard to specific marketing analytical decision tools and with the conventional marketing mix model. The literature reviews also reveal that the exploration of marketing processes in organisations is seriously neglected from a phenomenological perspective.

In order to explore the 'lived' reality of strategic marketing planning, a research methodology based on phenomenology was developed. Phenomenology has as its subject matter consciousness and experience, where one returns to the self in order to discover the nature and meaning of things as they appear. This is accomplished through the process of the in depth interview, where the researcher attempts to obtain descriptions and explanations of lived experiences.

Three key interlinked research questions were raised about the general model of strategic marketing planning, in terms of how it might operate in a diverse range of organisations. One question sought to ascertain whether or not marketing planning decision making resembles the conventional mainstream model. A further question examined the extent to which marketing planning tools may inhabit only a textual reality, rather than the lived reality of a marketing manager's world. An additional question focused investigation on determining what marketing decision making expertise actually consists of, if it is not about the explicit skills and knowledge embedded in the rational technical model of planning.

The subsequent phenomenological analyses of the interviews, which involved the process of meaning condensation and the explication of key themes, demonstrated that the complexity of marketing planning and individual action cannot be collapsed into one analytical model. While findings showed that managers were familiar with the traditional model of marketing planning, when they discussed their own life worlds, a different form of discourse was articulated to that of the mainstream model. The intelligent lay language that the marketing managers used drew on a locally constructed knowledge base where marketing and its environment was defined not in any abstract way but in terms of particularised activity frames. Unlike the tenets present in the technical rational model of marketing planning, managers were found to explain their life worlds qualitatively and narratively, using stories and socially constructed metaphors. Although managers plan, this research revealed that the content, style and outcomes of plans do not coincide with the tenets of the mainstream marketing approach.

Marketing decision making and action was found to be based within a locally enacted, hermeneutical circle of talk, relationships, tacit knowledge and emergent issues, rather than in functional, text based systems. These all represent experientially based areas that the traditional model of marketing planning fails to encapsulate in its framework. The research further established that the written plans of marketing managers functioned as cues and guides, rather than as prescriptively directing action.

In this study, the interviews show that marketing managers develop their own locally constructed marketing mixes. What appeared to be significant to them in the marketing offer were quality, service and relationships. Selling was seen to be a major aspect of marketing practice, suggesting that it has a much more wide ranging role than indicated in the majority of previously published works.

Based on the findings of this study, a revised theoretical structure is proposed for understanding marketing planning, which draws on the key metaphors used by the marketing managers researched. As well as explaining action, this practical theory offers up ideas for action to managers, rather than prescriptions. An important recommendation that flows from this theory is the 'strategic marketing signpost'. This takes full account of the local and socially constructed nature of marketing planning in organisations and of the role of plans as guides. Its proposed structure is one that recognises people's narrative and qualitative understanding of the world.

## **ACKNOWLEDGEMENTS**

With many grateful thanks to the those marketing managers of 'Newfound' City who agreed to be interviewed. Without your time and stories, this study could not have been completed.

With thanks to Peter Baron and David Pickton for continued support over the last six years.

To Michaela, 'A Big Hunk O'Love'. You never once said this was 'Too Much', everything was taken with such 'Amazing Grace'. I hope I 'Don't' have to say anymore, 'Are You Lonesome Tonight?'



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## **CHAPTER ONE**

# **STRATEGIC MARKETING AND PHENOMENOLOGY: A REVIEW OF THE KEY ISSUES**

## **1.1. INTRODUCTION: THE STRATEGIC MARKETING PLAN AND THE PLANNING PROCESS**

The intention of this study is to explore the practice of marketing management as it occurs in a range of business organisations. The contention is that the way in which marketing is portrayed in many standard texts and articles, means that it is seriously neglected as a social practice. Marketing is a reality mediated by the local contexts in which organisational actors operate. A key theme running through this study, is that marketing activity is formed by the world of experience and practice and not by frameworks of knowledge presented instrumentally and heuristically. It is postulated that what is required instead, are attempts to ground our understanding of marketing in local spaces and local contexts, rather than in general prescriptions. In the latter approach, marketing management is often cast as being about a technically rational activity. This largely ignores the subjective worlds of those who have to carry out marketing for real. The result is that practical knowledge for marketing and marketing planning becomes simplified and is seen as the result of frameworks for thinking which are present in texts.

To present these frameworks as reality reduces the complex interpretations and actions of individuals in organisations to a guileless and functional predetermination. In this 'mainstream' perspective marketing appears to be composed of general laws and if these are not being presented in texts, then researchers are busy trying to uncover them in a diverse range of research situations. Few studies of marketing management adopt an ethnographic perspective and fewer still attempt to explore how marketing is actually managed. There exists considerable scope therefore to examine marketing from these perspectives. This study is going to redress the general problem outlined here and to understand marketing conditions in the context of the marketing practitioner. Importantly we need to know more about this neglected dimension. To do this effectively, a framework for inquiry is needed and this is presented by the marketing plan. Metaphorically, this represents a map, the intention being to use it as a way to guide the researcher over some familiar and unfamiliar marketing terrain. On a long and difficult journey, a structure that facilitates movement is essential.

Given this context then, the purpose of this chapter is to provide an overview of key literature associated with strategic marketing planning in organisations, prior to discussing the research project and its implications for current published material. A central theme to be explored in this chapter revolves around the purported efficacy, in practice, of the universal model of the strategic marketing plan and planning process, as propounded by large numbers of marketing academics and consultants, see for example Kotler (2000 p89) and Goetsch (1994). Virtually every book on the topic of marketing, including those which deal specifically with marketing planning, offer up some definition of the term marketing. One of a few exceptions to this seems to be Van Mesdag (1988 p15) who points out that,

"...this is the only marketing book in which there are no definitions of the concept of 'marketing'. Definitions are avoided because there are so many."

In contrast, it can be argued that definitions are important and need to be examined, because they can be seen as being the basis of action, influencing the way in which marketing is practised. In looking at this issue, Doyle (1998 p34) suggests that marketing's fundamental aim is to assist the organisation in surviving and prospering by meeting customer needs. While this says little about the processes involved in carrying out external marketing activities, it does suggest that as a business philosophy, marketing has to be accepted by staff as constituting a meaningful set of ideas and tools which can be used to facilitate exchanges with customers. As Pulundran and Speed (1996) point out, marketing planning and marketing orientation, the latter manifested as a cultural configuration within the organisation, are both very closely connected, and it is argued that the success of the business depends on both being implemented appropriately.

Doyle (1998 pp96-104), goes on to suggest a second meaning of the term marketing. The first, indicated above, is typified as a philosophy of business, while the second is seen as a distinctive set of activities and tasks that constitute the area of marketing planning and decision making. There is general agreement among many marketing writers, for example Kotler (2000 pp63-83), Dibb and Simkin et al., (2001 pp689-714),



that marketing functions describe activities such as researching customer needs, developing new products, modifying existing ones, pricing goods, advertising and distributing them to selected market segments. These can be seen as discrete activities, but more usually are regarded by conventional marketing theory as being only really effective if they are used synergistically and planned in a rational and organised fashion (Kotler 2000 p87). It is at this point that we arrive at the notion of strategic marketing planning.

In the literature, the model of marketing planning that is presented is a very consistent one, applying to both large and small organisations. The widely accepted model of the planning process assumes that decision making is linear, using a range of established techniques, where the planner moves through a series of predetermined stages that can be applied to any marketing situation, irrespective of context. Writers subscribing to this approach include McDonald (1999 pp25-66), Aaker (1998 pp295-305), Kotler (2000, p87), Luck, Ferrell and Lucas (1989 p11). A review of the standard textbooks and articles on the subject of marketing planning suggests that for most writers, there exists little variation in the stages and steps identified as constituting the marketing planning process. Ennis points out that,

"The key lesson to be drawn from this approach (and the others) is that without exception, they portray the planning exercise as sequential, rational, logical and predetermined." (Ennis 1994 p334).

If we consider the nature of the strategic marketing planning process, for writers like McDonald (1999 p525) and Kotler (2000, p76), it begins with the organisations mission, which acts as a guide for corporate and marketing objectives. The intention of the mission is, in part, to motivate employees, by providing a goal they can strive for, and to give a sense of purpose and direction. Hooley, Cox and Adams (1992), note that a problem here is the wide gulf which exists between theory and practice in mission statement execution. In particular, it can be suggested that the issue of trying to implement a corporate culture is one fraught with difficulties (Axtell Ray 1994). The assumption is that the organisation operates as a cooperative social system and chief executives have a role to articulate and disseminate key values.

It can be argued that this perspective reflects the dominant approach to the study of marketing and organisations generally which is systems driven and functionalist in nature (Durkheim 1964 pp49-63). Effectively, the individual is removed from organisational analysis (Boden 1994 p20). This view of organisations fails to capture individual constructions of reality, (Berger and Luckman 1966 pp147-211) and is hence highly questionable. Workplaces can be conceptualised as being comprised of a plurality of cultures and interest groups and we may want to ask if the values of the organisation's leaders are shared by all. In terms of implementing marketing planning, this can be seen as being very significant indeed. Culture is in fact all pervasive and can be influential at other levels as well. In a comparative study of British and Hong Kong companies and their approaches to strategic planning, Reid and Hinkley (1989), found that managers in the UK were much less likely to take account of market share position than Hong Kong managers. The latter were considerably more concerned about earnings per share than their British counterparts. In the survey, forward planning was found to generate more positive perceptions in Hong Kong firms than in UK organisations.

After arriving at a mission, the first formal step in the marketing planning process is that of conducting the marketing audit (Brownlie 1996). The audit brings together information on the organisations marketing environment, its current objectives and strategies, with a view to identifying problem areas and opportunities (Kotler 2000 p88). Subsequent to this, a range of planning tools are suggested for use (Piercy and Morgan 1994), which assist the organisation in market analysis and objectives and strategy setting. These planning tools, which include for example the Boston matrix, perceptual mapping and the directional policy matrix, are widely discussed in marketing textbooks, and generally are regarded as being very relevant to business decision making (Kotler 2000 pp68-73). Greenley however, who has written extensively on marketing planning, has indicated that the uses of the planning tools described in the literature, are very limited. He also notes the general lack of published books and articles on empirical approaches to marketing planning (Greenley 1987;1988); (Greenley and Bayus 1993).

What follows the marketing analysis and audit as Ennis (1994) points out, is the setting of marketing objectives, the development of strategies and the formulation of action programmes, along with projected profit and loss positions and appropriate control mechanisms. The company should now be able to produce a formal document, which is the marketing plan. This represents the classic Kotlerian textbook approach, the dominant marketing paradigm, which is present in the work of other marketing writers see for example Mercer (1996 p25) and Doyle (1998 pp96-134). Piercy and Giles (1989), indicate that the actual marketing decision making process in organisations is much more complex than this model suggests, and Mintzberg (1973 p44), while admittedly discussing corporate decisions, argues that the typical manager is not a reflective systematic planner as the traditional model appears to indicate. The suggestion is that it is open to question and certainly open to further empirical investigation, as to whether marketing decision making occurs in a rational and deliberate way in accordance with the stages model. It is argued that logical flow models in practice, do not comply with the reality of planning marketing, if indeed marketing activity is planned in the sense alluded to here. Piercy and Giles (1989), go on to suggest that adherence to the conventional model may in fact damage marketing performance and Morrison and Wensley (1991), point out that some of the techniques may be analytically suspect, or open to misunderstanding as McDonald (1990) has pointed out.

Additionally, Brown (1995a p53), poses a more serious issue, suggesting that the theoretical foundations of marketing are seriously flawed, believing that "The marketing mix is all mixed up". In terms of the implementation of marketing and its problems, time for planning is also seen as an issue. A study by Reuters Business Information, of thirteen hundred marketing executives, found that eighty three percent of each day was spent on routine short term administrative matters, leaving very little time for future marketing and strategic planning (Leggett 1996). At a fundamental level, the universal logical framework of planning is seen as failing to correspond with the reality of organisational decision making.

## **1.2. CORPORATE DECISION MAKING AND THE USE OF STRATEGIC MARKETING PLANNING**

It is difficult to address the issue of strategic marketing planning without making reference to the copious literature on corporate strategic planning. As Pearson and Proctor (1994) note, the association between corporate planning and marketing planning is regularly examined in the literature. Drawing on the work of McDonald (1982), it can be postulated that some organisations do not actually distinguish between the two areas. Plans for marketing are built into corporate plans. Brownlie (1985) and Lynch (1994), postulate that the two areas are very closely connected. Increasingly, some commentators like Webster (1992), argue that marketing's role must be seen as a company wide one and discussions about marketing become ones about the general direction of the entire organisation.

Denison and McDonald (1995), indicate that their research shows that as markets and companies become more international, marketing's role becomes more influential, permeating the whole organisation. More empirical research similar to that conducted by Greenley (1987), regarding the decision making process in organisations needs to be carried out. This could try to establish the extent of the relationship between the areas of marketing and corporate strategy. Additionally, research must try to determine what organisational members perceive to be 'marketing' decisions, as opposed to whether these same decisions are seen as representative of other business areas, see Robson and Rowe (1997).

Since the early nineteen sixties, strategic planning has been seen by many commentators to be of increasing importance and relevance as a method of dealing with the turbulence and apparent complexity of the business environment (Egan 1995 pp64-65). Key figures like Ansoff (1965 p105), an advocate of the classical model, have guided thinking in this area, expressing a view that effective strategies are only developed via logical analytical techniques and processes. One view is that strategic planning and strategic marketing planning evolved from theoretical and empirical problems associated with the analysis of organisations based on the traditional static

closed view of organisations, where the latter was principally concerned with issues of internal design (Morgan 1986 pp19-38). What was consequently developed was an approach which saw organisations as dynamic open systems, concerned with information flows and decision making based on a rapidly changing environment (Burns and Stalker 1961 p5).

The latter, in a highly influential study, attempted to show that organisations need to adopt a degree of fluidity and flexibility in their structures and strategies if they are to respond to the environment effectively. In this scenario, planning can no longer focus solely on internal system relationships, where best fits are attempted to be achieved between the various functional parts of the business, but rather planning must be outward looking and consider alternative possible futures in a systematic and analytical fashion. What is missing however from this analysis of organisations is any sense that they are occupied by individuals. Instead, there is a preoccupation with structure over agency and the organisation becomes reified (Boden 1994 p29).

Essentially, many traditional academic accounts of organisations are so devoid of people, that the impression is given that it is structural, disembodied forces which are able to realise objective ambitions apart from the action of humans. What needs to be demonstrated, through research, are the ways in which organisational actors realise their environments and that these are as equally important as knowing what constitutes that environmental system. Much analysis of marketing and indeed business, seems to rest on the often unstated assumption that it is the systemic qualities of the organisation that makes decisions and not the people within it. It is suggested here, that organisations and their environments should be understood in terms of the meanings employees attach to objects (Weick 1995 p164). The structures and operations of organisations, rather than being discussed as if they are autonomous entities, should be conceptualised as being the product of human beings, pursuing their own ends, within available means (Silverman 1970 p132).

This phenomenologically based perspective is seen as forming an important, yet neglected approach to the study of organisations and the area of marketing planning.

It is seen as the key theoretical and methodological resource to be utilised by this study. For examples of philosophy and method, see Moustakas (1994 pp103-119) and Giorgi (1992; 1994). Phenomenology is concerned with the understanding of meaning which people use to make sense of their world (Haralambos and Holborn 2001 pp1060-61). There is a concern to understand the social construction of reality (Berger and Luckman 1966 pp49-60) and to concentrate on the subjective aspects of social life, internal to individual consciousness. Hackley (1998a), advocates a social constructionist approach to research into marketing. Whilst pointing out that there are some differences in methodology, Hackley (1998a), indicates that there is a shared assumption in terms of a commitment to understanding research subjects experiences, for all researchers working within the social constructionist perspective. The implications of this general philosophical approach means that different research methods are employed to those used by researchers working within the positivist tradition. In terms of a phenomenological approach to social constructionism, it is inductively grounded in the research data, where the conceptual framework emerges from fieldwork in the course of the study project (Miles and Huberman 1994, pp86-87).

### **1.3. THE TRADITIONAL APPROACH TO MARKETING PLANNING: WHAT ARE THE BENEFITS?**

In the literature, a substantial number of books and articles commend marketing planning as a process, examples being McDonald (1999 p28); Dibb and Simkin et al.,(2001 p691); Jain (1997 pp21-40), Verhage and Waarts (1988); Philips et al (2001). For McDonald, it is unwise to assume that there is no causal relationship between commercial success and formalised marketing planning procedures.

"companies with complete marketing planning systems will be more successful than those without, in environmental and competitive circumstances which are directly comparable." (McDonald 1996 p11).

In terms of empirical support for assertions that marketing planning is beneficial for

the organisation that uses it, an early study was carried out, where a view emerged that companies who prepare plans for known needs and probable developments, fared considerably better than those who did not plan (Kollatt et al., 1972; cited by McDonald 1996 p9). Sometime before Kollatt's work, another study (Leighton (1966; cited by McDonald 1996 p10), indicated that companies who showed a high growth rate were those that used systematic planning procedures. More recently, Denison and McDonald (1995), indicated that excellent companies in their sample all had marketing planning systems, and McDonald (1999 pp6-7), believes that marketing planning is essential because the business environment is increasingly hostile and complex. For McDonald, marketing planning facilitates the minimisation of non rational responses and develops the ability to meet change effectively.

Additionally, McDonald (1982), carried out a substantial piece of research into the marketing planning practices of international companies. His subsequent analysis indicated that he saw a number of key benefits associated with the marketing planning process. He postulated a procedural benefit, in that marketing planning leads to the setting of realistic business objectives, based on market information and control mechanisms that can effectively monitor performance. The second key benefit identified by McDonald (1982) is important in terms of issues related to the organisational behaviour dimensions of marketing. He postulates that planning leads to higher levels of management motivation, interfunctional cooperation and awareness of the need for change. Other benefits identified are associated with higher success rates than non-planning firms and the ability of planning companies to reduce waste and to avoid duplication of effort.

A problem is that McDonald generally has one view of planning, seeing it as technically rational behaviour. With regard to marketing planning, there may exist many rationalities among organisational members (Silverman 1970 p147). There seems also to be an unwritten assumption that planners can somehow control their future, which can be questioned. Drucker (1980 p9) notes in times of turbulence (and who would say no times are not turbulent?) that the most probable assumption is that a unique event will change the configuration of the market and that this unique event cannot be

planned for, only responded to. Furthermore, marketing planning effectiveness within small and medium sized firms has been questioned (Lancaster and Waddelow 1998), raising concerns about its apparent universal applicability. Echoing this point, Brytting (1990), suggests that the traditional theories and models simply do not function well enough to capture the complex and capricious events in the smaller firm. Speed (1994), argues that the highly consistent model that is the conventional approach to marketing planning fails to take account of an organisation's environmental context and the different decision situations firms find themselves in. Additionally, Saker and Speed (1992), point out that in fact the adoption of a prescriptive approach to marketing planning may actually be counter productive, as it could well destroy an efficient but non planning culture.

For Dibb and Simkin (2000), there exists little question that the traditional marketing planning process provides important benefits to the organisations that want to use it. For them, it is not an issue of 'why' marketing planning, but of 'how'. In the context of an alternative philosophy of marketing, this view can be seriously challenged however. In discussing new marketing strategies, Chaston (1999 p14), has noted the development and growth of what he terms entrepreneurial transactional marketing and entrepreneurial relationship marketing. In both cases, there is an emphasis on constant innovation and the challenging of current methods of conducting marketing operations. In the case of entrepreneurial relationship marketing, the focus is on joint innovative activity. This takes place between employees and their counterparts in the customer organisation, the latter leading to superior product offerings. Chaston (1999 p127), notes that both small and large organisations are embracing this approach to entrepreneurial marketing as the external business environment becomes more competitive. As a consequence, highly regimented internal environments that incorporate systematic planning structures are unlikely to be able to foster the constant and rapid innovations required by this new entrepreneurial marketing model. Additionally, Chaston (1999 p155), notes the significant impact that internet, web based business activity and advanced technology will have on these new types of marketing organisation. In times of rapid change, Chaston indicates that it will increasingly be the entrepreneurial type marketing operation which prospers, rather



than the one wedded to traditional techniques.

The idea of a successful company is not as straight forward as McDonald (1999 p62) implies either. We may wish to ask who defines the notion of success and how is it to be measured? The managers or indeed owners, who simply survive from one trading year to the next without using marketing plans, may regard the business in subjective terms as a success, while perhaps financially oriented measures of performance will find the business wanting. From a phenomenological perspective, the meaning of the term a successful organisation must be seen in the context of the subjective views of organisational members as they go about constructing their own realities (Silverman 1970 p132). It is suggested that this is the case in practice, despite a drive towards the use of apparently objective and overarching measures of performance, contained in the marketing metrics approach (Clark 1999). Connor and Tynan (1999), point out that a problem with marketing metrics is that there exists little agreement on what are the best measures.

Another key problem is about the issue of attempting to establish a causal relationship between strategic marketing planning and business success. Just because firms employ marketing planning does not guarantee success over those who do not utilise it. Leppard and McDonald (1987 p1), point out that their research actually indicates that many meticulous marketing companies do not perform successfully, " whilst the sloppy or inarticulate in marketing terms do well." This seems to suggest that the methodical use of conventional marketing principles alone will not automatically guarantee success. As Whittington (1993 p41) points out, strategy is a contested and imperfect practice, and success in it cannot be achieved by the simple implementation of textbook prescriptions. Also, as Robson and Row (1997) and Kent (1986) have noted, from a phenomenological perspective, there exists more than one type of approach to implementing marketing practice.

In a study by Griffin (1989), it was found that of seventy nine businesses from twenty countries surveyed, all of them prepared some type of marketing plan and when presented with the classical standard model, sixty five percent said their process was

very similar and twenty eight percent said it was somewhat similar. These findings seem at odds with those of Greenley (1987), who indicates that companies in the main, do not undertake formalised marketing planning. Griffin did find that there was an absence of tactical detail in the planning systems of some respondents, leading him to ponder the point that these may be developed on an ad hoc basis as the companies move through the planning year. If this is the case, then it could perhaps be suggested that a significant number of these incremental type tactical marketing management decisions shape later strategy to an extent not revealed by Griffin's use of closed questionnaires. Questionnaire based postal surveys, like Griffin's, if they assume either implicitly, or explicitly, the primacy of the rational model, cannot probe at a deep enough level to reveal alternative approaches to marketing decision making that companies may employ. As an alternative, it is argued that the phenomenological in depth interview can arrive at an understanding of the essence of experience (Moustakas 1994, p114), providing a rich description of managers perceptions of the marketing planning process. This represents a research agenda informed by social constructionism, where what goes on in organisations in the name of marketing, is often language and context dependent (see Hackley 2001a pp51-57).

#### **1.4. STRATEGIC MARKETING PLANNING: COGNITIVE SKILLS AND ANALYTICAL TOOLS**

From the perspective of those who advocate the use of strategic marketing planning, a key factor which appears to militate against its effective and more widespread use is the apparent inability of many companies to actually understand marketing in practice (Simkin 1996). In recent research, Dibb and Simkin (2000) and Simkin (2002), suggest that managers now have a better knowledge of marketing, but their work also indicates that significant issues of understanding still remain. Furthermore, the research of Hill et al.,(1998), demonstrates that there is a marked lack of specific marketing planning competencies in staff. From the conventional perspective, this represents a significant barrier to the proper use of the marketing planning process and to the successful implementation of a marketing plan.

A major problem with the traditional model of marketing planning, particularly from the viewpoint of those who advocate its use, is that there appears to be a range of barriers in existence that mitigate against its implementation Brady and Davies (1993); Wong et al., (1988). McDonald (1989), focused on some of these cognitive issues associated with strategic marketing planning. The barriers to marketing planning he identified included issues like confusion over terminology and procedures associated with marketing planning and a lack of knowledge and a lack of marketing skills. Research by Doyle et al.,(1986), revealed that British managers lack key high level marketing skills in comparison with their Japanese counterparts. This study was supported by Wong et al's., findings (1988), which showed that British companies planning procedures were found wanting in relation to Japanese firms. Saunders, Saker and Smith (1996, p229) conclude in an overview of the state of marketing planning that,

" ...many managers do not even know the basic tools of marketing... "

Simkin (1996), an advocate of the formal planning school, indicates that the points of McDonald's largely reflect his own experiences. He argues that there is a relatively poor grasp of the marketing concept in many organisations, and it is hence not very surprising that the use and understanding of marketing planning is not rigorous. This point is also noted by Pickton (1993) and Pickton and Wright (1997 p1). Simkin's research (1996), shows that while many marketing organisations do plan, large numbers do not undertake formal market research and the planning that does take place is often very rudimentary. This was an issue identified by McBurnie (1989), who commented that some two thirds of British companies did not have clearly defined market strategies, or use basic marketing disciplines like market research and new product design. Simkin summarises this position when he states that,

" The marketers themselves can lack the formal skills required to conduct marketing planning; the analysis required, the recommendation of target market planning and the formulation of marketing programmes capable of moving on the business in the light of market developments

and the organisations needs " (Simkin 1996 p381).

Simkin (2002), in commenting on his own further research in this area, suggests that these problems are still in evidence. They have however, been joined by newer problems. Examples cited include issues associated with the harmonisation of marketing planning initiatives across several organisational sites. Greenley (1987) examined the current level of knowledge about the actual planning of marketing, as practised by organisations as opposed to textbook prescriptions of what ought to happen. He identified only seven major studies of marketing planning, surprising perhaps given the copious number of prescriptive texts on the subject. Alternatively, the problem here may be concerned with the issue of access to organisations (Hammersley and Atkinson 1995 p55), given the potentially sensitive nature of the material. In terms of research into marketing, it is probably easier to access consumers rather than companies. Greenley (1987), quoting from his own 1982 and 1983 studies, pointed out that of the one hundred and twenty firms examined only a quarter of these had plans that could be considered to be comparable and adequate, when compared with the prescriptive literature and that only twenty five percent used the prescribed strategic marketing planning process.

In an important study, Greenley and Bayus (1993) investigated a number of key areas associated with marketing planning. It was found that very few companies utilise the marketing planning decision making techniques advocated in the literature. Of the one hundred and six companies examined who were asked about the use of tools like perceptual mapping and PIMS (profit impact of marketing strategy), it was found that the majority were unaware of these methods. Generally there was low awareness of marketing planning tools and low usage (Greenley and Bayus 1993). Robbins (1991), also examined the use of a range of analytical marketing planning tools in his case study of a medium sized family business. He found that generally, strategic marketing planning was absent, and also marketing research, a key factor that is supposed to feed into the marketing planning process (McDonald 1999 pp412-413). In a study of marketing planning in eastern Europe, Hooley et al., (1996) revealed that only a very small number of firms currently employ marketing planning in any meaningful way.

To echo Kent (1986), much of the research we have considered above appears to show little interest in the subjective understandings of marketing from practising managers' points of view, but only in whether or not they use or understand the universal prescriptions of the current marketing faith. It might be the case that if more research was based in the grounded experiences of managers rather than in the supposed laws of marketing planning, then we would start to take possession of a knowledge base providing us with a clearer view of the actual lived reality of organisations. Here we would concentrate on a phenomenological perspective, which draws on practitioners' experiences of the world, rather than on the canons of prescriptive modernist marketing theory, see Robson and Rowe (1997).

## **1.5. MARKETING PLANNING AND MARKETING ORIENTATION**

There is evidence to suggest that the acceptance of a need for a focus on the market is widespread in many business organisations, see for example Kohli and Jaworski (1990); Narver and Slater (1990). Furthermore, it is suggested by Wilson and Gilligan (1997 p679), that a company possessing a marketing orientation will always be considerably more successful than one without.

"In the absence of marketing orientation it will be difficult to implement and control marketing activities effectively since there will be no marketing plan."

We should note however, that while the marketing concept might be accepted within the firm by organisational members at a philosophical level, this does not mean that as a consequence, it will be operationalised effectively and efficiently (Wilson and Gilligan (1997 pp679-685). Furthermore, marketing itself may be taken to mean different things to different staff (Robson and Rowe 1997).

In terms of developing the former perspective, Jaworski and Kohli (1993), define market orientation as essentially being composed of three factors. Firstly, a market orientation comprises the company wide generation of market intelligence relating to

present and future customer needs, the dissemination of this intelligence across the organisation's departments and finally, a responsiveness to this information. The latter being about developing and then executing marketing plans. A market orientation can be seen to be composed of the whole of the organisation's marketing effort. Jaworski and Kohli's model is about operationalising the marketing concept, which they note in the literature, has been taken to be about customer focus, coordinated marketing and profitability.

In an earlier study, Kohli and Jaworski (1990), provide a useful framework for understanding the market orientation construct in terms of what is needed for it to be established and to function effectively in an organisation. Firstly, there are what they call the antecedents to market orientation, organisational factors which enhance or impede the implementation of the marketing concept in a company, namely senior management support, organisational systems and interpersonal dynamics. Additionally, they isolate demand and supply side factors in the industry which can also effect the implementation of the marketing concept, like the levels of technology in use by suppliers and customers. These are referred to as moderators. The final element is composed of the outcomes of a marketing orientation, which can be structured around three key points related to measuring the success of a business, these being customer responses, business performance and employee responses.

Kohli and Jaworski (1990) do not suggest however, that the possession of a market orientation will always lead to greater business success. They found that a market orientation is useful only if the benefits of it exceed the cost of resources allocated. Under conditions of limited competition, stable market preferences, technologically turbulent industries and booming economies, a market orientation may not relate strongly to business performance. The field interviews carried out by Kohli and Jaworski (1990), indicate that in certain cases, environmental contingencies operate under which the impact of market orientation on business performance is minimal.

By contrast, market orientation for Kohli and Jaworski (1990), was found to be important in situations where companies experienced market, as opposed to general

environmental turbulence. The companies studied were forced to undertake research and develop products in response to the constantly changing needs of customers, rather than to the impact of more general environmental factors. In overall terms, the benefits of a market orientation were found to be greater for companies in competitive industries. Marketing can not be seen as a monolithic concept then, but perhaps one which changes in different and complex industrial contexts. As an example of the dominant paradigm, it can be argued that the work of Jaworski and Kohli (1993) is about providing universal prescriptions regarding what market orientation and successful marketing practice is. This should not however necessarily invalidate other marketing meanings and actions (Kent 1986), which may be regarded by their initiators as successful, despite the fact that they fail to conform to universal definitions of what good marketing practice is. Gummesson (1987) also appears to support this idiographic and intuitive approach, suggesting that each marketing situation be treated uniquely and within its own right.

Also reflecting some concern about the inadequacy of the marketing concept are Baker (1989); Thomas (1993a); Sachs and Benson (1978); Brownlie and Saren (1992). They question the worth of the continued emphasis placed on it by marketing academics, consultants and practitioners. The latter suggest that the marketing concept is now of only historical interest, being based ideologically within the expansionist era of a post world war two America, failing to be suited to the complexities of global business now. Alongside this, Pearson (1993), also questions the approach found in the vast majority of textbooks on marketing, that suggest a marketing orientation should be the primary one in any business.

Whilst it can be argued that textbooks only provide broad conceptual frameworks, Brown (1998a p38) argues against this, he points out that textbooks,

"...comprise the repository, the shop window, the very epitome of marketing."

Pearson indicates that the situation is much more complex in terms of managing an organisation than many marketers, wedded to the notion of marketing orientation,

accept. What is required he points out, is for the organisation to be oriented to the key dimensions of accounting, production, marketing, research and development. For Pearson (1993), organisations which are too strongly focused on a single orientation tend to perform badly in the long run.

## **1.6. MARKETING PLANNING, ORGANISATIONAL CULTURE AND THE ROLE OF INTERNAL MARKETING**

For Kohli and Jaworski (1990), in order for a market orientation and by implication a marketing plan to be implemented, the development and existence of an appropriate culture should be facilitated. A number of other writers also suggest that a marketing based culture is essential in order to develop and implement effective marketing planning systems, see for example Leppard and McDonald (1987); Piercy and Morgan (1994); Piercy (1997 pp592-3), Greenley and Oktemgil (1996). Simkin (2002), sees many internal barriers to marketing, many of which relate to the problems that McDonald (1989) had identified.

Leppard and McDonald (1987;1991) carried out research which attempted to provide an explanation for the apparent corporate resistance to marketing planning which exists. Their research showed that the acceptance of marketing planning is largely contingent on the stage of development of the organisation and the behaviour of the corporate culture carriers, being senior executives who have the ability to influence the norms and values of organisational members. What can occur here is that the corporate culture carriers may in fact exhibit behavioural patterns associated with orientations other than a marketing one, with the implication being that marketing planning is unlikely to be given very serious consideration. As an example, Whittingdon and Whip (1992), note the pre - eminence of accountants in British industry, a factor they see as militating against the implementation of a marketing orientation in organisations. It is argued that accounting has nurtured it's ideological framework and mobilised the latter carefully to advance the collective interests of the profession.



If Greenley and Oktemgil's (1996) proposition is correct, that companies with marketing based cultures do better than those without, then the process of instilling in organisational members an appropriate set of values, is of paramount importance for advocates of the prescriptive approach to marketing.

Piercy (1997 pp567-617), suggests that this is a neglected area in terms of the study and implementation of marketing planning systems, recognising that while there is considerable focus on formal analytical techniques, more attention has to be paid to the context in which marketing planning occurs. Piercy and Morgan (1994) identified a number of significant behavioural problems associated with marketing planning that relate to the culture and meanings held by members of the organisations studied. These included factors like planning recalcitrance and avoidance, inward looking orientations and planning uncertainty. Driver (1990) also stress the key role of this human element in terms of developing effective marketing planning systems. This is a point often ignored in much of the prescriptive writing on the marketing plan, see Jain (1997 p21-40). Piercy and Lane (1996), indicate that people issues are part of the marketing planning process. Rewards for the organisation come from getting the marketing act together and ensuring that individuals are motivated and excited about the marketing plan.

Piercy (1997 pp567-617), locates explanations for failures of marketing planning in the realm of culture and organisational behaviour relating to marketing orientation. He suggests that an effective tool for achieving the implementation of the marketing plan is the adoption of internal marketing, where the organisation has to attempt to gain the commitment of it's members to the proposals contained within the marketing strategy. Internal marketing has received a growing amount of attention in the literature, for example Siu and Wilson (1998); Ballantyne (1997); Rafiq and Pervaizin (1993). For Mudie, internal marketing is essentially about,

"...selling the job to employees in other words the job becomes the product and the employee the customer." (Mudie 1987 p2).

Whilst it is recognised that marketing is mainly concerned with forces outside the organisation, in order to maximise the use of its resources, it also has to be concerned with what takes place inside the firm (Mercer 1996 p301). In many areas of business, the most valuable resource a company has is its employees, in terms of delivering the external strategy. A growing number of marketing practitioners and academics now see as critical to the success of the business organisation the latter's ability to deliver differential advantage by way of the service component of the people element of an expanded marketing mix (Christopher et al., 1991 p13). This idea is further developed through the notion of brand reality. Here, branding is organised so that employees become passionately aligned to their company brand, via a range of internally driven culturally based processes (de Chernatony 1999). This is essentially internal marketing and should result in a common culture, dispersed throughout the organisation described by Peters and Waterman (1982, p10), as shared values.

The logic of this is that in using the vital internal resource of people, the company can face up to its external environment more effectively. In order to achieve the latter, many of the traditional tools of marketing can be used to great effect in the areas of internal communication and motivation. Employee needs can be researched in much the way external customer needs are, and a mix of communication tools like in house publications and seminars can be utilised as part of an internal marketing strategy which should facilitate the external marketing strategy (Piercy 1997 p603). Dibb and Simkin (2000), also suggest that the ineffectiveness of much marketing planning is the result of internal barriers, which act as impediments to successful implementation. They argue that once structural factors like culture and internal relationships are managed properly, then the external marketing plan can be smoothly executed.

What all these apparently persuasive but ultimately rather simplistic prescriptions fail to take into account is the difficulty in achieving one cultural perspective in an organisation. This is a point well noted by Varey (2000), who suggests that all individuals in organisations, rather than pursuing mutual understanding, are actually engaged in their own concealed strategic action. Organisational members exhibit

differing perceptions of reality then and the organisation itself is seen as the outcome of people as employees attempting to resolve their own problems (Silverman 1970 p126). Company cultures which seek to foster a managerial, collective image of the organisation through various forms of representation, serve in some ways to conceal the plurality and diffusion in objectives which exists among employees. As an example, there is frequently much organisational cynicism about marketing held by non-marketing managers and staff.

"The effects of poor image and professional arrogance combine...to create a cultural divide and 'a level of distrust that is unbelievable and an air of antipathy that is devastating' between marketing and other functions." (Cranfield School of Management/CIM 1994 pp58-59).

Here the contribution of an ethnomethodological perspective can be applied to the study of culture and the people element in organisations (Boden 1994 p35). Ethnomethodology is an approach to social analysis which is grounded in the detailed study of everyday life, examining the ways in which people order and make sense of mundane activities, particularly regarding how they make these activities accountable to others Hassard (1990); Garfinkel (1984 pp30-1). Attempting to instil a monolithic culture in a company, is based on a view of organisations which perceives individuals as functionaries of the system with allotted roles, and not as free thinking, self conscious beings. In contrast, ethnomethodology works within the latter perspective, having a strong base in the phenomenological approach (Watson 1997 p61). This suggests a research agenda which needs to explore the perceptions of employees in an organisation, examining the way in which individuals become involved in the making and executing of decisions about internal and external markets.

## **1.7. TURBULENT BUSINESS ENVIRONMENTS AND THE ADEQUACY OF THE STRATEGIC MARKETING PLANNING PROCESS**

One way to conceptualise the basis of marketing planning is to see it as a logical

outcome of systems theory. The organisation can be viewed as a system of closely connected and interdependent parts (Parsons 1951 p6); (Thompson and McHugh 1990 pp25-6). Saker and Speed (1992), suggest that McDonald's approach to marketing planning is a contingency one, where organisational performance is a function of the fit between managerial methods and strategies and the external environment. In turbulent environmental conditions, McDonald (1982;1989), asserts that the adoption of formal marketing planning is functionally necessary, enabling managers to contemplate their options in a structured and logical way and to choose the best strategy to deal with the environment. Tammo et al., (1996) also advocate prescriptive marketing planning, in order to cope with environmental uncertainty.

The argument here is that turbulent conditions can best be managed by adopting more sophisticated decision making methods. This perspective cannot however be accepted uncritically and we may want to ask to what extent can the traditional linear strategic marketing planning process actually cope with an often turbulent and increasingly fragmented business environment? One view here is that present decades are no more turbulent and perhaps a lot less than at previous times in history. For example, the change experienced in Britain during the industrial revolution makes current events appear less significant. Saunders et al (1996, p218) point out that, " anyone who believes turbulence is increasing has read little history."

An important point often neglected in systems thinking is that environments can be seen as being selectively perceived Boden (1994 p39), Weick (1995 p41). The environment is not an objective fact external to the organisation, but is actively constructed by organisational members. The process of environmental analysis is not performed by an impersonal system function, but is an individual act and what one manager sees as an important variable could well be discounted by another (Brownlie 1994). The latter also indicates that the conventional planning model of Ansoff (1965 p105), which emphasises the collection and dissemination of information is only one part of a far wider range of processes in organisations revolving around attitudes, systems of operations and structures. The importance of managers cognitive frames in interpreting information and the influence of context and time, have consequences for

notions of what is meant by the terms turbulence and stability.

Mintzberg (1994 p208), argues that turbulence is high on the agenda of the planning fraternity because of their preoccupation with a steady state and the exercise of complete control. It is this that accounts for the reason why they become panic stricken, when ripples and discontinuity occur externally in the business environment. The point might be that strategic planning may not in fact be particularly relevant to dealing with any type of environment, not just one that is characterised as turbulent. Mintzberg postulates that strategic planning is a wholly inflexible and unrealistic way of dealing with any change in the organisations environment. If it was the one best way, then we would expect that the incidence of companies actually adopting strategic marketing planning frameworks to be higher than it is in practice.

To reinforce the point about an uncertain environment, Brown (1995a p47), argues that the nature of the current chaotic and turbulent postmodern world renders the traditional practices of marketing increasingly redundant. He argues that there is a massive fragmentation of markets occurring, where segments are becoming smaller and less accessible and consequently antipathetic to planned approaches. Postmodernism poses particular problems for modernist marketing, with its rejection of absolute theories and the advocacy of an advanced relativism that denies the existence of any objectively determined reality (Brown 1993). In terms of current marketing models and theories Brown (1995a p47), suggests that these have little relevance for the chaos inherent in the postmodern world.

With regard to the fragmentation of markets mentioned above, marketing practitioners are being driven to deal with customers who require services tailored to individual needs, making traditional planning methods largely irrelevant. King (1994), has noted the rise of a new individualism, which makes buyer behaviour unpredictable and hence planning much more difficult. This is reflective of new approaches in consumer behaviour, based on a postmodern perspective, where identity is seen as being constantly in flux and changing (Marsden and Littler 1998). This view is reflected in a study of consumers carried out for J. Walter Thompson, the advertising agency.

"It is now apparent that consumers are apt to flit between many modes of purchasing and consumer behaviour within twenty four hours, let alone a month or a year." (McMurdo 1993 p27)

With regard to the competitive environment and its analysis, there are no shortage of strategic planning tools which allegedly will assist companies in determining the best future strategy, see for example Lynch (2000 pp560-611). Gummesson (1999, p32) notes however, that present complex environmental conditions have led to a state of what is termed hypercompetition. The latter thrives on the continuous disruption of competitive advantage and a successful organisation is one possessing superior ability to manoeuvre in a state of constant turmoil and disruption. In this situation, it can be argued that the conventional strategic marketing planning techniques become largely redundant. Gummesson (1999 p32), suggests that hypercompetition and other global developments like privatisation, has meant that firms may prosper and succeed through collaboration and the building of long term relationships and networks, as opposed to being locked into the older marketing paradigm of the four Ps. It is argued that a new marketing paradigm has emerged, to replace the old model. For Gummesson (1999 pp20-22), this is about thirty relationships, rather than four Ps.

In terms of the wider business environment, Hooley et al., (1996), found that managers who were studied in eastern Europe, where there is a relatively recent history and culture of marketing planning, expressed the view that planning even two years ahead was impossible, attributable in part to the new world order that has superseded the break up of the old communist bloc. This new world order has resulted in a wide range of nation states and ethnic separateness. The international trading environment has experienced massive structural change, typified by disorder and discontinuity, making planned global marketing strategies difficult to implement (Doole and Lowe 1999 pp5-6). In these postmodern circumstances, it can be postulated that the certainties of the past do not seem to exist anymore. The original concern with planning can be seen as a response to the time in which it was first implemented by business, rather than as being a technique unbounded by time and space. Rational planning took root in the early and mid seventies, when increasing

levels of global competition, the oil crisis and recession meant that many managers were looking for ways in which to influence and coordinate company activities (Morrison and Wensley 1991). It seems questionable to assume that the old marketing certainties are still relevant in the contemporary world, but many are evident in texts.

### **1.8. MARKETING PLANNING TOOLS; RELEVANCE AND CAPABILITY**

Having considered the issue of strategic marketing planning in terms of its overall linear process and the latter's relevance for dealing with the business environment, we now turn to an examination of a particular aspect of marketing planning, namely the use of a range of analytical tools. With regard to the latter, it is widely accepted that the conventional orthodoxy of strategic marketing planning includes a range of analytical tools, like the product life cycle, experience curves, the Boston Consulting group matrix and the General Electric matrix (see McDonald 1990; Piercy and Morgan 1994; Hussein 1987).

There is argument to suggest that these tools and techniques are ill equipped to deal with changes occurring in the business environment Brown (1994), and that the tools are analytically incapable of delivering organisational advantage anyway, as indicated by Morrison and Wensley (1991). This is an issue distinct from the fact that managers might fail to understand the tools and how to use them (McDonald 1990), or that the models are being subjected to increasingly sophisticated theoretical developments (Hussein 1987). Brown (1995c;1998b p85), postulates that the tools of marketing research, seen as important contributors to marketing planning, are in fact being seriously undermined by the postmodern world and forms of media like films and novels. These he argues, provide deep insights into contemporary consumer culture which extant market research tools fail to do, based as they are, on researchers representations and client beliefs in marketing meta-narratives.

If we turn to a specific consideration of one of the tools, Mercer (1993) points out that the biological analogy of the product life cycle, which suggests that goods and services move through a series of stages, from birth to growth, then to maturity and on to

decline and death, has long been an important element of marketing planning, but that its supposed universal applicability is largely a myth. His research indicates that in most markets, the majority of the dominant brands have held their position for at least two decades and that this is characteristic of continuity, rather than evidence for life cycles. Mercer suggests that for the latter reason, in terms of longevity, many products lie outside the planning cycle of organisations and hence the product life cycle concept offers little of practical value for most marketers. One possible implication of a reliance on product life cycle theory is that it might tempt managers of successful brands into prematurely anticipating the latter's move into decline and hence to kill off the product in question (Brown 1994). Wood (1990) arguing from a different perspective, suggests that product life cycles are becoming shorter and the advent of flexible manufacturing undermines the whole of the conventional planning idea anyway.

The Boston matrix is another key tool. It is a psychologically appealing simplifying technique, with a market growth, market share matrix. Each of the four matrix categories have characteristic cash flow potential and a corresponding strategy prescription, in the gaining of an overall balanced product portfolio. The classification of products and or strategic business units, into four portfolio categories of stars, cash cows, question marks and dogs, facilitates the determination and prediction of not only cash generation, but investment requirements as well, with a scale for relative market share and market growth. Products and or strategic business units can then be plotted with circles representing the latter. The Boston Box deals with the allocation of resources among a diverse portfolio of products and a key assumption here is that the relative cost position of the organisation is a fundamental determinant of strategy success.

Morrison and Wensley (1991), call into question the value of the Boston Matrix, considering it to be an "outmoded and discredited orthodoxy, which is seductive and dangerous for young managers of tomorrow." (Morrison and Wensley 1991 p123). The latter regard the Boston Box as an approach which 'boxes' in strategic thinking, is dysfunctional and fails to provide any really useful analysis. A key criticism of the Boston box is that it is far too narrow in focus, is not comprehensive enough and fails



to take into account a range of other factors which are likely to influence investment decisions (Wensley 1995a). For example, gaining market share may not correspond with the objectives of some managers in some enterprises, particularly if in a difficult market. Also, internal funding issues, on which the logic of the box is partly based, may not be seen as the driving priority of managers charged with customer facing responsibilities. It is suggested that only empirical investigation of meanings and action can reveal this. In terms of definitions classifications and practice, the Boston box and the expanded nine box version of the directional policy matrix, the latter attempting to account for previously ignored factors like market attractiveness (Wensley 1995a), can be difficult to work with. Furthermore the criteria used, their variability, and the allocating of products to a simple quadrant, will not alone guarantee strategic and operational success.

There are fine dividing lines between the various quadrants on the matrix and allocating a brand conclusively to one, might result in a decision later regretted. A product might be prematurely deleted, if it is seen as occupying an inappropriate position on the matrix. Other problems relate to whether or not managers and staff share the rationality of the whole model. Implementation decisions related to the use of the box will rest on employee perceptions and not on any apparent universal prescriptions of what constitutes the correct marketing approach. Although there are studies to show that the use of box can lead to some success in certain instances, it has not been proven to be a concrete marketing truth that operates for all organisations all the time Morrison and Wensley (1991). The Boston Box, even if managers do somehow agree on where it shows the organisation should go, does not indicate how it should get there and as Hooley, Cox and Adams (1992) indicate, strategy reviews and subsequent mission statements that emerge do not always end up in directly related actions.

Arguably, despite a significant amount of research and replication, the apparent universal applicability, analytical power and predictive ability of the Boston matrix and other tools, are far from established (Brown 1995a p47). Malcolm McDonald, probably the key figure in the United Kingdom when it comes to the advocacy of traditional

strategic marketing planning, has himself noted that perhaps some of the conventional wisdom is no longer relevant. For him, Marketing is in fact in a mid life crisis (McDonald 1994), a view reflective of the concerns raised here in respect of some of the conventional tools and in particular, the Boston Matrix. A further general cautionary point is worth noting here, regarding the link between marketing theory and practice, reported on by McKenzie et al., (2001). Their research indicates that many marketing theories, which by implication includes many of the tools discussed here, were not considered to be relevant to the actual work of the practising marketing managers they sampled and whose opinions they sought on the topic.

### **1.9. STRATEGIC MARKETING PLANNING AND ORGANISATIONAL DECISION MAKING**

The previous two sections suggest that there are problems associated with the fashion in which marketing planning is popularly conceptualised. It is not altogether clear that organisations use the linear planning process in the way some of the literature indicates, or that the rational models of decision making, like the Boston Box, are as useful as some commentators seem to believe they are. With these points in mind, an important area that needs to be considered is some alternative views on the nature of the decision making process in organisations, as distinct from the issue of cognitive and analytical understanding considered earlier.

For Piercy and Giles (1989), the recognised and logical planning sequence contains many implicit and underlying assumptions about marketing planning that are open to doubt.

"The apparent logical sequence of activities in strategic marketing planning which is popularly portrayed by textbooks and consultants is a gross and unnecessary simplification of organisational realities." (Piercy and Giles 1989 p19)

What we need to ask here are two questions. Firstly, what is the empirical process

involved in making a marketing decision and does it in any way resemble the model advocated and described in the literature? Secondly, if the decision making process does not resemble the conventional model, how can it be conceptualised? The prescriptive model assumes that the decision maker or makers involved in strategy formulation, move through a series of stages, as explained earlier, in a rational and deliberate fashion. Piercy and Giles (1989), postulate that the traditional model assumes that strategies are deliberately chosen, ignoring an alternative concept of management which is grounded in the practical realities of the situation, rather than in the conventional planning textbook. To this could be added the question of whether or not practising managers actually share similar notions of what is meant by the meaning of the term marketing 'strategy' (Kent 1986).

For Piercy and Giles (1989), the essential problem is that many conventional writers and consultants assume that real planning actually follows a rational and orderly sequence of goal setting, analysis and decision making. It can be argued that the process does not proceed in this fashion. Piercy and Giles propose another model known as the illogical one, based on the experiences of managers, starting with a consideration of tactics. It is argued that the illogical approach functions on an iterative level, in that managers move backwards and forwards continuously within the planning system, in order to test the implications of each new analysis, or piece of information.

" Those tactical issues have very real implications for what strategies can sensibly be laid down for the business." Piercy and Giles 1989 p23).

Further indications that the rational linear approach to making decisions is not the only method, is produced by Nakata (2000). In an ethnographic study of two multinational subsidiaries that had recently adopted the marketing concept, Nakata (2000), produced evidence to show that one subsidiary implemented the process through an intuitive behavioural, action to idea path, as opposed to the idea to action method. The former unit put the marketing concept into practice in reverse order, where action preceded explicated thought. Behaviour was in the form of incremental reactions to a range of information and stimuli. The unit started the whole process by carrying out

customer centred activity, like giving out timely information to buyers, emanating from the idea that this would activate increased competitiveness. It was later that the marketing concept became formalised as the major approach to doing business. In the case of this subsidiary, there appeared to be a circular trial and error approach to decision making, that is clearly different to the prescriptive model of planning.

The notion of an intuitive approach to marketing decision making, as suggested by Gummesson (1987) and Nakata (2000) raises an important issue. There is line of argument stressing the point that the area of practical expertise has a strong unarticulated dimension. If this is the case, then it is possible to question to what extent the theoretical models of marketing accurately structure these practical skills (Hackley 1999). Marketing decision making skills may in fact largely reside in a tacit dimension, one that is yet to be satisfactorily theorised by the current abstract models. Much of the knowledge base of the latter is explicit, yet Bauman (1999 p53) suggests that much technical expertise is only generated by lived experience, realised through organisational learning. For Baumard (1999 p53), tacit knowledge represents a knowledge base that is difficult to analyse, being only ephemerally perceptible.

What we must be careful of doing here however, is not to overstate the case for the irrelevancy of the planning tools, even though they may appear to inhabit a reality largely composed of texts. Research might well reveal that some marketing managers use these planning tools, like the Boston matrix, in an intuitive and tacit way. Devoid of their scientific marketing status, and used as points of argument, the tools may well assist marketing managers to better understand and act on the local context of decision making. A similar issue may well be raised in relation to the actual marketing planning process, but the argument appears much more difficult to sustain, given the criticisms raised against it earlier in this section. Additionally, other views also suggest that the strategic planning process is not the systematic and well programmed science the conventional model indicates it is.

For example, Mintzberg (1987), postulates that planning processes are characterised by logical incrementalism, rather than by the rationality of management science.

Strategies are emergent and crafted out of force of circumstance. In a similar vein, Wrapp (1984), suggests that managers muddle with a purpose, in that rather than attempting to push through total packages, the good manager will move forward in a piece meal way in order to achieve what is required.

Furthermore, based on empirical research into the process of marketing planning, Lancaster and Waddelow (1998), identified significant process barriers to its successful implementation. The marketing managers interviewed felt that the traditional approach was too cumbersome and hence consequently ineffective. The research shows that managers inhabit a detailed, complex world and that attempts to drive the strategic marketing planning process from the textbook approach created a gap between theory and practice. There is in the prescriptive linear approach the myth of the 'right' answer to marketing problems, denying flexibility and producing a plan that is written in tablets of stone. Lancaster and Waddelow (1998), indicate that managers are calling for a new planning methodology which is tailored to their own firms and which they can learn from on a continuous basis. They propose a new model which essentially provides an organisation with a learning culture, reflecting the idea of logical incrementalism where decisions are based on learning from past experience. Generally, considerable current attention is being paid to the notion of the learning organisation and organisational learning, (see for example Gummesson 1999 p135; Easterby Smith and Araujo 1999, pp11-13).

A key issue for Mintzberg (1973 p44), which has a significant bearing on the organisational decision making process, is the way in which managers carry out their work routines. It is fundamentally at odds with the view of reality presented by the rational model, which sees manager's time being largely spent on controlling planning and organising. In his important study Mintzberg (1973 p58), followed five chief executives as they went about their work, taking phone calls, attending meetings, scanned mail, received visitors and had unscheduled meetings. His primary conclusion was that managers work is fragmented, varied and characterised by brief encounters, with a great deal of emphasis on verbal interaction. For managers, talk is the work as Watson (1994, pp23-25) and Boden point out. The latter comments that managers,

"...talk their way to solutions, talk themselves into working agreements talk their coalitions into existence talk their organisational agendas." (Boden 1994 p52).

Another approach to the nature of decision making in organisations which problematises the conventional model is the one offered by March (1988 p270), who isolated the notion of bounded rationality. The latter is located in the heads of individual organisational actors, who are bounded by their capacity to process information and complexity. Individuals move iteratively through solutions until one works or fits, rather than searching exhaustively for minimum cost maximum benefit as suggested by the rational model, where there is an emphasis on objective planning and information systems. This perspective suggests that the issues of strategy and marketing decision making need to be grounded in the behaviour of individuals within organisations, rather than in reified planning systems, which somehow make people in organisations invisible, failing to take account of the reality of organisational life, as Grint (1991 p131) argues,

" The necessarily interpretative contingent and discontinuous nature of business life makes such strategic planning today - and its progenitor, Fayol's functional structure and planning - utopian ideals."

A contention is that one area where rational techniques might prove to become ascendant (McDonald 1990), is in the use of expert systems. The latter has received considerable attention in recent years, Mountinho and Paton (1988), Yang and Burrell (1995). Other studies like McDonald and Wilson (1990), report on the tackling of marketing problems, using these expert systems. For McDonald (1990 p11), the future of marketing is in this area. He suggests that the human mind is largely incapable of understanding and managing marketing techniques and hence,

"...expert systems will need to be developed so that these complexities are managed by the computer in a way which is helpful to practising managers in solving their complex problems."

Progress in the area generally is relatively slow, and time consuming, while the

techniques themselves might appear to be fairly sophisticated. Yanging and Burrell (1995) note that while marketing planning is an area which has been well studied and documented, it is a domain lacking a framework which can be transferred easily into a computer system, or which is directly applicable to building expert systems. McDonalds (1999, p40) model is regarded as being the most appropriate for current and future development with its universal stages and techniques. In practical terms, the inroads of expert systems into the marketing planning practices of companies is very limited and it presents a major challenge (Curry and Mountinho 1991). Arguably, a problem with the use of expert systems is that human beings can never meet the requirements of the rational model of decision making anyway, rendering problematic the implementation and use of expert technologies, the latter based as they are on the logic of the conventional framework of strategic planning. As Boden (1994 pp190-193) indicates, the nature of decision making in organisations is often incremental and fragmentary, where actors constantly adjust their understandings of situations. Weick (1995 pp76-82) argues that sometimes people will act first and then make sense of the outcome, suggesting that at some stage expert systems and human meaning are likely to come into conflict. Additionally, a key issue to consider is whether these expert systems can cope with the complexity of local rationalities and local approaches to planning and decision making, as opposed to the relatively straight forward, prestructured universal techniques advocated by McDonald (1999, p40).

#### **1.10. PHENOMENOLOGY, SENSEMAKING AND STORIES: THE SOCIAL CONSTRUCTION OF MARKETING STRATEGY**

In 1983, Day and Wensley suggested that a priority for theory development was the study of strategic marketing planning. This is still true today, and the purpose of this research study is to contribute to that debate. It is argued that a way forward is to develop marketing knowledge from the practitioner perspective, informed by a phenomenological approach. In line with this position, Weick (1995 pp17-61), has developed a conceptual framework for looking at the nature of decision making in organisations called the sensemaking process. " To talk about sensemaking is to talk

about reality as an on going accomplishment. " (Weick 1995 p15). For Weick, the seven properties of sensemaking are largely incompatible with the rational model of strategic planning. What they do however, is to provide a useful conceptual framework for thinking about how organisational members actually approach decision making, outside of the constraints imposed by the traditional prescriptive model.

For Weick (1995 p18), all sensemaking starts with the individual. As a consequence of this, the proposition that sensemaking is grounded in identity, is placed first on his list. Weick points out the establishment and maintenance of an identity is a central element of sensemaking. The self identity of a marketing manager does not develop in isolation, but within the context and confines of social interaction. Sensemaking can never be solitary, as what a person does internally, is contingent on the thoughts and actions of others. In organisations, marketing decisions are made either in the presence of others, or with the important knowledge that decisions will have to be understood, agreed and then put into action in a social context.

A further key aspect of sensemaking for Weick (1995 p24), is retrospect, the idea that all action, however recent, is past action and based on constant reflexivity, where what occurs can become an object of attention only after it has taken place. Specific meanings for individuals arise retrospectively and in this framework, strategy becomes observed patterns in past decision behaviour. It is not a future constructed now and then implemented, as the rational model suggests. Stacy (1993 p14), supports this perspective, suggesting that the marketing planning process is not valid because it is based on the faulty assumption that the environment can be predicted and that today's actions can be seen as part of that future. Consistent with this approach is March (1988 p270), who also problematises the rational planning model. He generally indicates that the anticipation of the future consequences of present decisions is often subject to considerable error.

An influence on sense making is ethnomethodology, as the latter understands that reasoning occurs in ways that are markedly different from rational practices associated with scientific thinking Weick (1995, pp12-13). More fundamentally, Weick's



sensemaking draws on phenomenology and Schutz's idea of meaningful lived experience, see Schutz (1967 p6).

"The key word in that phrase **lived** is stated in the past tense to capture the reality that people can know what they are doing only after they have done it." (Weick 1995 p24).

As sensemaking is fundamentally social, plans and strategies can change as a result of the interactions that inevitably occur in organisations. Here the link with ethnomethodology is apparent. The emphasis in ethnomethodology is on accounting for what one does in the presence of other people to prove social competence (Benson and Hughes 1983 pp99-127; Hassard 1990). What this also raises is the issue of the political dimension of decision making. It might be the case that decisions relating to marketing may in fact not be made, simply because the power holders in the organisation restrict discussion. Hendry (1995), also notes that the limits to rationality in decision making includes the prevalence of political behaviour, in that certain policies will not be implemented in a business because they conflict with the aims and interests of senior executives. As an example, McDonald (1989) makes the point that marketing is, in some organisations, isolated from the key operational side of the business. Decision making may be dominated by accountants and it is on this basis that the organisation operates. The new marketing appointment may find that,

" irrespective of their knowledge or skills quickly finds that all the power is vested in others, particularly for product development (the technical people) pricing (the accountants) customer service (the distribution department) and selling (the sales director) hence is powerless to influence anything of significance." (McDonald 1989, p5).

Weick (1995 p30) also draws our attention to the notion of an enacted, environment. For sensemakers, the environment is not a fixed and solid entity, but is enacted and sensible to those making decisions, who become actively involved in constructing the former. The context in which sensemaking occurs is also significant. Cues are taken from the environment and this establishes the frame for decision making. If events in the environment are not noticed, then they simply will not be acted on. In an

ethnomethodological context, strategic plans themselves can be seen as cues, indexically relevant which do no more than animate and orientate people, saying little about how decisions are sensibly perceived and enacted in organisations Weick (1995 pp49-50). This has significant implications for marketing planning.

For Weick (1995 p30), action in organisations is also based on what is plausible. The emphasis is on the practical, rather than what is accurate. The rational model assumes that a mass of data is collected on the business environment, when what really occurs is that the information managers do receive and act on can be very much restricted, a result of organisational pragmatics and what is considered reasonable and achievable. Finally for Weick (1995 p43), the seventh feature of sensemaking is that it is an on going activity. Events are always in flow and sensemaking never starts because duration never stops. Given this context, there is never the chance for the individual to adopt the posture of the detached, objective scientist. The world is continuous and dynamic, where management in an organisation is always about being in the middle of things. For Weick (1995 p44), actors in organisations are thrown into all manner of on going situations. This represents a stark contrast to the model of human action and understanding that is implicit in the traditional approach to strategic marketing planning.

Weick (1995 p127-31) also pays considerable attention to the role of stories in sensemaking. Story telling usually implies a narrative in which events are connected causally with each other (see Wallemacq and Sims 1998). In the study of organisations, attention to this area is considerable (see Gold 1996; Morgan and Dennehy 1997; Shaw et al., 1998; Gabriel 1998). Wallemacq and Sims (1998), draw our attention to the argument that we remember entirely in stories. In chapters five to seven here, marketing managers will be telling their own stories, showing that sensemaking is achieved in organisations largely through the phenomenological stance of storytelling (Wallemacq and Sims 1998). The argument is that people think narratively in organisations, where they will tell stories about their experiences in order to make these experiences manageable. For Weick (1995 p127), stories act as frames which help to guide conduct, using peoples narrative powers. Storytelling can then

take on deliberate strategic and tactical purposes (see Shaw et al., 1998; Wallemacq and Sims 1998). In the context of the research conclusions in chapter nine, the implications of this are significant. It can be argued that the conventional marketing plan taps into a rationality that fails to capture the reality of sensemaking in organisations.

In terms of the objectives of this study, the aim is to further our understanding of the actual, lived strategic marketing planning decision making processes, as utilised by organisational members. For Brownlie and Spender (1995) and Dunne (1999), significant to this is not the formal planning apparatus, but individual judgements that are utilised by marketing managers. In order to understand this dimension of action, a phenomenologically based subjectivist methodology will be adopted to explore the meanings actors attach to organisational reality. Importantly, it is necessary to know how managers actually go about perceiving marketing and how they act on their interpretations of it. Zinkham and Pereria (1994 p210) suggest that more surveys are not going to be able to achieve this. They point out that,

"...strategic marketing planning has become prematurely quantitative. To date, the most popular research method involves the use of surveys."

There are many examples in the literature of the latter, for example Greenley (1987); Greenley and Bayus (1993); Griffin (1989); Simkin (1996; 2002), providing us with copious data about marketing managers familiarity or otherwise with marketing planning. There is, however, a dearth of detailed, phenomenological data grounded in manager's perceptions and experiences of actual marketing processes, see Robson and Rowe (1997). This research seeks to redress this imbalance. The intention is to gain access to the life worlds of marketing managers and by using their own words and stories, attempt to develop an alternative, grounded perspective on marketing decision making in organisations. It is argued that there is no independent reality waiting to be uncovered, but alternative phenomenologically informed realities. There exist then, varied perspectives for understanding marketing in organisations (Kent 1986). The review carried out in this chapter suggests that to see strategic marketing

as simply being about a technically rational process obscures and also ignores the complexity of the interpreted social world.

## **CHAPTER TWO**

### **MARKETING THEORY AND PHENOMENOLOGY**

## **2.1. ORGANISATIONS, MARKETING AND SCIENTIFIC METHOD**

In the first chapter, a range of literature was examined, concerned with the theory, practice and state of current research into the domain of strategic marketing planning. Additionally, material was considered which related to the decision making process in organisations generally. Questions have been raised which suggest that the dominant paradigm can be seriously challenged and that marketing action can be conceptualised in other ways. This chapter seeks to examine in more critical detail some of the theoretical and philosophical issues which underpin approaches to the study of marketing, which were raised in the first chapter. It is argued that the implicit and sometimes explicit social theory on which our current conceptions of marketing planning rests, is flawed and in need of revision. The intention in this chapter is to also consider more fully the phenomenological perspective. This is in order to lay the foundations for an alternative approach to understanding marketing and to form a basis for a later discussion of the methodology used in this study.

All attempts at understanding organisations and their operations are based on some form of theoretical framework, which is either explicit or implicit (Brown 1992 pp29-38). Any analysis of marketing planning then, carries within it a perspective on the way in which organisations can be characterised and explained. Positivism is the dominant mode of inquiry in the study of marketing (see Anderson 1983; Robson and Rowe 1997). Positivism rests on the assumption that a single external world exists, and that this social reality can be empirically measured by independent observers using objective measures. The world can be explained and predicted through the identification of universal laws and generalisations (Brown 1995a pp142-144). In the context of social inquiry, notions of feelings or subjective experience are viewed as being merely metaphysical abstractions (Hunt 1994).

Positivism entails a belief that only those phenomenon which are observable, in that they are amenable to the senses, can be validly warranted as knowledge (May 1997 pp31-2). Silverman (1970 p41), suggests that positivism fails to take into account the

point that the social and natural worlds are different, in that they cannot both be researched using the same underpinning epistemology. In the study of matter, the latter does not understand its own behaviour. It is meaningless until the scientist imposes his or her frame of reference on it. These assumptions Silverman postulates, cannot be applied to the investigation of social life. The social scientist cannot just observe behaviour, but must understand action. The action of people is meaningful to them, unlike the behaviour of matter. The social world has an internal logic all of its own. The action of people derives from a network of meanings which they construct and of which they are conscious. Schutz points out that,

"The world of nature, as explored by the natural scientist does not mean anything to the molecules, atoms and electrons therein. The observational field of the social scientist, however, namely the social reality, has a specific meaning and relevance structure for the human beings living acting and thinking therein." (Schutz 1954, pp266-7).

Positivist science can be seen as being broadly deductive. A scientific theory will be constructed to explain the laws pertaining to a particular area and a hypothesis is derived in order to enable the scientist to test the theory (Gill and Johnson 1997 p139). In a marketing context, Anderson (1983) notes that the PIMS (profit impact on marketing strategy) studies reflect a positivist position, based on the observation of fifty corporations. The researchers concluded that there is a positive linear relationship between market share and return on investment. Anderson (1983), points out that the findings have become a universal statement and are converted to a normative prescription for business strategy. It is precisely this attempt at generalisation in conventional science that can be questioned, in that it raises the issue of laws and systems which in a social context, makes the individual appear like a puppet in a theatre.

In positivist science, if the hypothesis related to the inquiry is rejected when tested, then the former must be revised (Gill and Johnson 1997 pp28-33). Anderson (1983), opposes this falsificationist argument, in that a universal hypothesis can then be deemed worthless by a single negative instance and any number of explanations can

be offered for an aberrant empirical test by the researcher.

" An alleged refutation of the theory can be easily deflected by suggesting that something else in the maze of assumptions and premises caused the result." (Anderson 1983 p21).

In considering organisations and their relationship to positivism, the dominant approach to their conceptualisation and study is to see them as systems and structures. Systems theory embodies the positivist assumption that organisational structures determine behaviour. Systems theory can be seen as being rooted in the philosophical beliefs of positivism, where the social world is seen as being made up of deterministic and objective features and laws, independent of individual perceptions and meaning (Arndt 1985). Within a positivist framework, the social world can be studied like the physical world, where phenomenon are looked upon as subject to natural laws that can be investigated by observation and experimentation (Gill and Johnson 1997 pp151-162). Positivism assumes that society and organisations are objective things, waiting to be examined and analysed (Townley and Middleton 1984 p4). The pattern is nomothetic, formal and conceptualised independently of peoples individual perceptions of reality. In being transposed to the study of organisations, positivism can be observed as searching for universal laws. For example, this could be finding the one best way for marketing to be planned and managed. The aim is to develop a unified concept applicable across time and space, be it marketing or administrative management. Human behaviour is seen as a response to external stimuli, which are the functional requirements of the system, be it society or the organisation.

Silverman (1970 p33) notes that,

"Underlying the closed system view is the positivist assumption that objective factors detected by the observation of the scientist exert a direct influence upon human behaviour."



This perspective it can be suggested, strips organisational analysis of people (Boden 1994 p29). The firm is theorised and operationalised as an autonomous unit, that appears to act, think, learn and decide as a result of its own momentum. Within the logic of this approach, social actors are rarely seen. Whilst it must be recognised that organisations do have some solidity over the actors within them, this apparent objectivity is in fact created by people and is constantly open to reinterpretation and change, see Berger and Luckman (1966 pp149-204). As indicative of a systems view, Stinchcombe's definition of organisations sees them as essentially functionally driven and goal oriented, almost devoid of human complexity and meaning. Organisations are,

"...a set of stable social relations deliberately created with the explicit intention of accomplishing some specific goals or purposes." (Stinchcombe 1965 p142).

Etzioni (1961 p79), adopts the systems approach indicated above. People and the creations of human agency, like institutions, are explained away in the form of an analysis based on the functions, needs, goals and overall agenda of the organisation. Actors disappear into the walls of the organisation. There is a deterministic core where the system dominates over the individual. This represents a one sided view of Weber's notion of bureaucracy, in which work processes are functionally determined, (Gerth and Mills 1948, pp51-55). Alternatively, what is needed, it is suggested, is a research agenda that attempts to put people back into organisational analysis, where the complexity of human action and meaning is captured in a satisfactory fashion, sufficient to provide the opportunity for meaningful analysis to take place. In reflecting these issues, much marketing planning theory rests on the fundamental philosophical premise that there is a single external world amenable to manipulation and control by a set of objective analytical tools, as indicated by Kotler (1997 p65). "The marketing plan is the central instrument for directing and coordinating the marketing effort." Two crucial questions exist here. Do marketing managers in fact perceive the role of the plan as fulfilling this function? Secondly, do their conceptions of the structure of a marketing plan and a planning process correspond to the model which is propounded by the likes of Philip Kotler?

## **2.2. STRUCTURAL FUNCTIONALISM, SYSTEMS THEORY AND ORGANISATIONAL ANALYSIS**

Systems theory is part of the structural functionalist attempt to study the nature of order and cohesion in society. At a fundamental level, functionalism is inextricably tied up with the question of how order is maintained in society. How do we avoid Thomas Hobbe's war of all against all? (MacPherson 1965 pp61-68). For functionalists, order, stability, cohesion and integration are maintained in society and organisations by its constituent parts. As a consequence, both are looked on as systems which develop appropriate sub-systems to maintain order (Parsons 1951 p6). Functionalism can be seen as a theory which sees human behaviour as a reaction to external stimuli. An early contributor to functionalist theory and methodology was Durkheim, (1964 pp49-69). His focus is on the systematic properties of social wholes, combining differentiation and interdependence. For functionalists, key questions revolve around understanding the contributions that the parts make to the whole.

A key figure in theorising society and organisations is Talcott Parsons. Organisations are viewed as systems in their own right and also as part of the larger system of society (Parsons 1951, pvii). For Parsonian functionalism, an important area of analysis is to explore the way in which sub systems like the organisation interact with the wider social system, namely society. Drawing on functionalist theory, Thompson and McHugh (1990 pp25-26) note that organisations, in an open system, of whatever type, will perform a number of functionally necessary services for the maintenance of the overall systems well being. Functionalism makes the claim that it is possible to integrate all the diverse systems in society, like the organisation, the family, the education system and the cultural system, through the use of a concept known as the central value system (Townley and Middleton 1984 pp5-12). In essence, this means that there are shared orientations towards action in society, as each component of the system strives towards a common end. At the individual level, each member of society

has a specific role to play on the basis of having shared expectations and thus behaviour is predictably patterned.

Functionalism has been criticised from a number of perspectives. It fails to account for conflict, assuming a harmony of interests within the organisation, whereas domination, subordination and divergent interests are key features of many work organisations (French 1989 pp21-30). The focus on shared goals is also problematic (Donaldson 1985 p86), as these very goals may represent the views of the dominant power holders in the organisation, who manage to relegate alternative perspectives to places where no influence is achievable. As Silverman points out,

"...the goals of the organisation work not to determine peoples behaviour, but to serve as a way of justifying or legitimating it." (Silverman 1994 p2).

In terms of its relationship to the underlying epistemology of positivism, functionalism represents a search for an overarching logic and method in all forms of experience, relating to society and to organisations. As a consequence, organisational life is seen as essentially predictable, rule bound and reified.

"Much analysis of organisation has been embedded in the traditions of research and investigation current in both the natural and social sciences. The tradition was positivistic, functional and normative." (French 1989 p6).

C. Wright Mills (1959 pp33-59), has described functionalism as grand theory, a theory which emphasises the importance of impersonal forces shaping human behaviour, a view he regarded as an inadequate approach to form a basis for social inquiry. Mills called for social scientists to study individual life instead, in order to understand society and organisations. He argued that there is no grand theory and no one universal scheme of which we can understand the unity of social structure. This can be seen as a call for researchers to explore as fully as possible individual perceptions and experiences of events, in order to develop a deeper understanding of social processes. In terms of marketing planning, obtaining a better knowledge of small scale settings

could deepen the awareness that marketers have of this area generally in terms of raising pertinent issues.

Whereas functionalism has often been associated with the status quo, in that society and organisations are viewed in terms of immutable laws and systems waiting to be discovered, structural Marxism can also be criticised from a perspective that identifies it with the shortcomings of grand theory. Another systems based model is presented by conflict theory (Haralambos and Holborn 2000 pp11-14). For example, Marxism, a variant of the latter, sees human behaviour as primarily explained in terms of a reaction to the forces and relations of production, prevalent in society at a particular historical epoch (Marx and Engels 1968 pp38-40). Within the logic of the Marxist paradigm, individuals merely carry out their allocated function in society and organisations as a result of their position in the class system. Epistemologically, it is possible to take issue with any of these systems based views, that sees society and organisations as composed of a single reality, a reality largely indifferent to the interpretivist problem of meaning and individual action (Boden 1994 p40).

### **2.3. MARKETING: A SYSTEMS VIEW**

Developments in structural functionalism and systems theory occurred through the work of Burns and Stalker (1961 p209), who suggested that the nature of the organisation was contingent on the nature of its environment. Firms are not homogeneous, as sub units or departments are likely to have different environments and therefore require specific structures to be successful. The starting point of this open systems perspective is the need for the organisation to transact with its environment and to implement the appropriate organisational structures in order to cope with external states of continuity or change. Theoretical developments within the systems perspective culminated in the contingency approach, see Reed (1985 p100); Brown (1992 pp89-125). This perspective attempted to specify the appropriate functional fit between different environmental settings and internal organisation

structures.

The open systems model can be contrasted with the closed systems model, where organisations are conceptualised as self supporting bodies, insulated from extra organisational factors, see Clegg and Dunkerley (1980 p3). This view represents the classical and traditional perspective on organisations, which takes little or no account of the environment, being concerned instead with manipulating internal variables in the service of goal attainment. In marketing terms, this process can be equated with the state of production orientation, with the firm focusing on issues of factory efficiency (Pearson 1993). It can also be argued that the human relations perspectives of writers like Maslow (1943), are typical of functionalist, determinist closed systems thinking, which generate universal models of psychological needs. These models, suggest its advocates, if understood and used properly, will result in effective system states in organisations (see Clegg and Dunkerley 1980 pp353-4;Morgan 1990).

In looking at marketing from a functionalist and systems perspective, we could ask what contribution the former makes to the well-being of the organisation and how this is achieved. The intention of functionalist thinking is to produce generalisable knowledge, applicable to all organisations and their actions at all times (Morgan 1990). It can be argued that within the discipline of marketing, functionalism and systems theory represent the dominant paradigm of study. An example of this commitment is present in the work of Dixon and Wilkinson (1989). They point out that,

"The functionalist paradigm provides a general analytical framework for the study of marketing; one in which the study is of a hierarchy of marketing systems." (Dixon and Wilkinson 1989 p68).

Dixon and Wilkinson argue for a return to the functionalism of Alderson (1950) in the study of marketing, but it can be asked has it infact ever gone away? Dixon and Wilkinson seem to adopt a specifically Parsonian model of functionalism and marketing and the role of individual meaning and action is never mentioned in their article. They

identify seven system levels of marketing each of which is seen as an input to the other levels. For Dixon and Wilkinson, there are no questions about the perceptions of marketing managers, or how decisions are made, but for them, research must focus on how the overall system works. They develop a framework in order to try and understand this problem, called the systems environment relations model. It is suggested that this will help researchers to investigate system and sub system relations and interactions with non marketing systems. Emphasis is placed on the problem of system survival and system adjustment. The implications of a hierarchy of systems in marketing means that the often messy nature of human decision making can be alleviated and subsequently ignored in research. Marketing can be conceptualised then as being organised, coherent and logical.

Dixon and Wilkinson's work reflects a great deal of mainstream marketing thinking, see for example Kotler (2000 pp76-83); Doyle (1998 pp96-134). In these schemes, it is apparent that all the conventional tools of the discipline have a functional role to play and appear as objective scientific methods which overarch the organisation's members perceptions of marketing activity. Decisions about marketing planning, the nature of organisations product and service offerings, are not seen as locally constructed or negotiated. Hackley (2001a, p94), makes a significant point in support of this latter contention when he states that in his interviews with marketing professionals, he has never heard of any marketing intervention that was not directed by anything else than local organisational politics, experience and judgement.

An important general issue to be made here is one which relates to conceptions of the business environment which are held by organisational members. It can be postulated that Dixon and Wilkinson, along with a significant number of other marketing writers, do not see that what is important to know is the way in which organisational actors respond to environmental pressures, and indeed, what they understand the environment to be. The way environments are understood is central to what they are, in a practical and rational sense. This micro level of analysis if missing, lacks everyday actors sense making of situations (Weick 1995 pp30-38). The assumption is, that in

the functionalist marketing framework, individual interpretations of reality have no possible role in the overall system analysis. Avoiding real world issues cannot in any way assist in the understanding of decision making in organisations and in the context of this study, the marketing planning decision making process.

## **2.4. PHILOSOPHY AND THE PHENOMENOLOGICAL PERSPECTIVE**

Quantitative research is depicted as deriving from a natural science, positivistic inspired understanding of how knowledge about the world should be generated. Phenomenologically based research which deals with the subjective experiences and perceptions of social actors, is also predicated on an a priori set of assumptions about the nature of social reality. More than data gathering techniques are involved and the different methods used, reflect divergent paradigms. These paradigms contain philosophical, ideological and epistemological assumptions about the nature of social reality.

A phenomenological perspective views society and organisations as being composed of differing perceptions of reality. The self is seen as existential, an active being in the world, constructing it, with organisations made up of people who make objectives and have individual definitions of their situation. Any attempt to understand social reality must be grounded in people's experiences of that social reality. This reality has already been made sense of by its adherents and so the researcher must try to understand actors' interpretative devices which provide the background to action (Silverman 1970 p5; Weick 1995, p8). What must occur in any inquiry based on a phenomenological approach, is that the researcher must create second order constructs of social actors' comprehension of social reality, whilst retaining a basic allegiance to the actors' own conception of the social world (Silverman 1993 pp94-114). Hammersley and Atkinson (1995 p7), point out that phenomenology has much in common with the philosophy of naturalism. The latter proposes that the social world be studied in a natural state,

undisturbed by the researcher. Additionally, it operates under the premise that the social world cannot be understood in terms of causal relationships or the subsumption of social events under universal laws. Naturalism argues that human actions are infused by social meanings and that physical stimulus can mean different things to different people and also to the same person at different times (Hammersley and Atkinson 1995 pp3-9).

The subject matter of phenomenology begins with consciousness and experience (Kvale 1996 pp52-55). Moustakas (1994 p26) notes that the term phenomenology was first used by Hegel, in philosophy in 1765. A well defined technical meaning was constructed, where phenomenology referred to knowledge as it appears in consciousness, describing what one perceives, senses and knows in ones immediate awareness and experience. Husserl (1931 p129), a key figure in phenomenology, postulated a programme for the study of peoples apprehension of the world and it's structures. A central factor in phenomenological understanding relates to the role of intuition (Moustakas 1994 pp32-33). Intuition is pivotal in the development of knowledge. The self is an intuitive, thinking being and the use of a priori reasoning is an essential tool in describing whatever presents itself. Intuition is taken to be in born and is used to assist us in obtaining a picture of the dynamics that underlay experience and in the accounts we use for providing everyday understanding. For Wallemacq and Sims (1998), phenomenology is based on the premise that we are inside the world we perceive and consequently cannot go outside that perception.

Central to Husserl's transcendental phenomenology, is the concept of epoch, which requires the elimination of suppositions and the raising of knowledge about every possible doubt. To follow this approach requires that the researcher engages in disciplined and systematic inquiries and sets aside prejudgements regarding that which is being studied (Moustakas 1994 pp85-90). In order to launch the study, the researcher should be free of preconceptions about the phenomenon based on prior experience. Here, key words are openness and receptivity. This process has also been referred to as phenomenological reduction (Hycner 1985), which is a framing of



comprehension, where the researcher must bracket their collection of understandings in order to be cognisant of the immediate subjective experiences of those being studied.

Another key concept in Husserl's work is the notion of intentionality, which refers to the internal experience of being conscious of something. Knowledge of intentionality requires that we recognise self and world as inseparable components of meaning. For Husserl, every intentionality is comprised of a noema and noesis (Giorgi 1992; Moustakas 1994 p31). The noema is not the real object we may be looking at or studying, but the phenomenon, the appearance of that object to us, which varies in terms of when it is perceived and in what context. The object is out there, in the world, present in time and space while the perception of the object is in our consciousness. In contrast, the noesis refers to the meaning we harbour towards that object; for every noema there is a noesis. The noematic side is the uncovering and explication of what is actually presented in consciousness. On the noetic side, we have an explication of the intentional processes themselves, an understanding of what we are experiencing. In other words, I perceive a particular object, be it a house or a tree and it is discerned in consciousness through a process of learning. I then derive meanings from the perception of that object.

What appears in consciousness is the phenomenon. One has to return to the self in order to discover the nature and meaning of things as they appear. In phenomenology, only one source of certainty exists and it is that which is thought, felt and perceived. Things possess objective reality only to the extent that they exist by representation in thought. Perception of the reality of an object are dependent on a subject Moustakas (1994, p59). In phenomenology, all scientific knowledge rests on inner evidence. This clearly marks out phenomenology from positivism, with the latter postulating that knowledge can only come from the study of external observable realities. This distinction has very significant implications for the nature of the research study here. Importantly, to explore marketing planning and strategy from a phenomenological perspective, means to use a research method that uncovers the

perceptions and thoughts of actors involved in it.

Any phenomenon represents a suitable starting point for a phenomenological investigation. What is given in our perception of a thing is its appearance, yet this is not to be seen as an empty illusion. The latter serves as the essential starting point of a research approach that seeks valid determinations, open to anyone to verify (Moustakas 1994 pp121-153). The researcher has to describe things in themselves, to permit what is before one to enter into consciousness and be understood in terms of its meanings and essences. The transformation of individual or empirical experience into essential insights occurs through a process that is known as ideation (Moustakas 1994, p21). The object that appears in consciousness mingles with the object in nature, so that a meaning is created and knowledge is extended. Thus a relationship exists between what is in conscious awareness, and what exists in the world.

## **2.5. ORGANISATIONS AND THE SOCIAL ACTION APPROACH**

In terms of its applicability to business organisations, a useful way to initially explore and develop some essential elements of phenomenology is to consider the work of Silverman (1970 p154), who developed the social action perspective as a counter to the dominance of systems theory. As Clegg and Dunkerley (1980 pp273-74) note, this social action approach draws strongly on the phenomenology of Schutz and of Berger and Luckman. Silverman is also influenced by the work of the German sociologist Max Weber. For Weber, social science starts with interpreting the social action of individuals in society, and the subjective meanings and purposes attached to it (Gerth and Mills 1948 pp 55-61). Berger and Luckman (1966 pp43-48), introduce the notion of the social construction of reality, where, rather than seeing people as products of systems and institutions, they are actors who create these patterns through their own meaningful activity.

Organisations are seen as social constructs, produced and reproduced through the

activities of members. This perspective is largely ignored by system theorists, where it is argued that organisations are governed by laws concerning their structures and the subsequent effect of these on individual behaviour. The consensual and objective image of organisations is challenged by social action theory, as it focuses on the multiple goals of organisational members, asking the question as to why places of work don't operate in the way we expect them to.

For Silverman, meaning is institutionalised in society and is continually reproduced and changed through the routine action of everyday life. His action frame of reference (Silverman 1970, p222), requires the study of the definitions of the situation of the actors involved in the organisation. These definitions will be constructed by actors from the meanings of the social world which are given by past history and the present structure of society. For Silverman, the action frame of reference is not in itself a theory of organisations, but is a method of analysing social relations within the latter. In the action frame of reference, the organisations environment, which is a key issue for marketing analysis (Brownlie 1985; 1996), is not conceptualised as a set of objective, deterministic system relations, but is dereified, becoming a differentiated stock of knowledge held by organisational members.

Silverman's action frame of reference also holds a view where interaction becomes central to organisational analysis. It is intended to draw out for study and for theory building a perspective on reality as socially constructed, socially changed and socially sustained. This can be seen as a critique of organisational analysis which portrays institutions as reified objects. When objectifying the organisation within the latter approach, it is noted that,

"...we begin with a priori notions of an organisations needs and then examine the processes through which it secures them." (Silverman 1970 p223).

In contrast, the action frame of reference attempts to empirically establish the conceptions of ends and needs held by its members. The argument is that organisations can neither have goals nor needs, only people can. Additionally, an

acceptance of organisations as if they were monadic, serves to conceal the plurality and sometimes diffusely conflicting goals of different members of the organisation. In later reflections on his earlier work Silverman (1994), does not deny the importance of structures and he points out that institutional factors, for example the level of resources available in an organisation, can have a significant impact on the nature of interpersonal enactments and definitions of the situation adopted by actors. In looking at the professional work of health counsellors, Silverman (1994) notes that if resources dictate that counsellors only have ten minutes available with a client, then the communications problems highlighted by his research will not be resolved simply by modifying how professionals interact with clients.

In the context of marketing, structural factors like the level of resources devoted to it are likely to have a significant impact on how a plan is to be implemented. However, looking at organisations purely from the point of view of actors definitions, has for Silverman a danger in that it presents an atomistic and totally individualistic approach. "... historical and structural factors are important in understanding activity in organisations." (Silverman 1994 p3). This point of Silverman's raises the question of the relationship between agency and structure in organisations and society and the ability of a social action approach to adequately deal with macro, structural issues in society (Thompson and McHugh 1990 p37). It can be postulated however, that it is only through the study of social action in organisations that we can see how agency and structure are interdependent and that the latter emerges out of the former Boden (1994 p13-15). Giddens (2001 p667-9), makes the point that society and organisations are constituted through what he calls the duality of structure, in that the production and reproduction of social order and institutions is accomplished through the reflexive interplay of social organisation and social interaction. This, as pointed out by Ackroyd (1994) and Boden (1994 p6), is the notion of structuration, a concept Giddens initially deployed to solve particular problems in the theory of class and later developed, so that it became an inclusive view of the dynamics of society. Giddens (1984 pp281-288), recognises that structures are produced by interactions, which in turn reproduce the overall characteristics of society, a process which can be applied to organisations

as well.

## **2.6. PHENOMENOLOGY AND MARKETING**

Having considered something of the phenomenological perspective in general, we can now examine its more specific application to marketing. Taking into account the problems raised by examining organisational and marketing activity solely from a functionalist, systems perspective, interest has been growing, over a number of years, in looking at marketing issues from a phenomenological stance. Kent (1986) for example, looks at the area of the marketing mix and marketing management. The study of consumers from the viewpoint of phenomenology features more prominently. Authors include Hirschman (1986) and Thompson, Locander and Pollio (1989). O'Guinn and Faber (1989) conducted research into compulsive buying, using a phenomenological framework, while McGrath (1989), examined the process of gift selection in a retail store, using participant observation, photography and in depth interviews. These are methods all of which move significantly away from the positivistic information processing models associated with much research into consumer buying behaviour.

Marsden and Littler (1996), have suggested that a phenomenological perspective has a lot to offer a number of areas in marketing. They suggest that in terms of market segmentation, consumers can be segmented by their subjective view of the market, using ideographic interviews. This it is argued, is in contrast to the conventional approach, where consumers are segmented in terms of a priori variables, using categories of a general law like nature. This methodology can clearly be seen in the vast majority of marketing texts, where there appears to be a universal, shared definition of what constitutes the key segmentation bases, see for example Mercer (1996 pp124-154) and Dibb Simkin et al., (2001 pp204-19).

Frequently, it is not the terms or definitions of the consumer which are used, but

categories which marketers impose on them. In terms of market research, it is suggested by Marsden and Littler that marketers become participant observers and study consumers more in their natural environment, rather than in terms of experimental test situations. Solomon and Englis (1997), in criticising the positivistic lifestyle constructs used by many marketing researchers, suggest that these do not coincide with the views of consumers. Categories are created and then imposed on individuals, instead of asking the latter to provide input regarding the group boundaries they perceive exist. This latter perspective dominates much academic research into marketing, see for example Dibb and Simkin (2000). There is inherent in this approach the assumption that there exists one particular way in which segmentation should be approached by managers, which is clearly at odds with much of the new postmodern approaches to marketing. Postmodern marketing sees the consumer as possessing multiple identities and life styles, which are not amenable to scientific calculation, see for example Elliott (1999; Brown 1995a p47-48; Firat et al., 1995).

Furthermore, in marketing research the reliance on standardised questionnaires results in an over simplified view of what constitutes marketing communications. In learning the views and language of consumers, limits are placed on the types of response allowed. What is needed is an understanding of the consumers interaction with a message, rather than focusing on expected reactions, seen as a result of universally applicable consumer communication models, see Barry and Howard (1990). Hackley (1998b) points out that these models show individuals as rational and simple information processors, failing to reveal how meaning is constructed by consumers. The focus of study has been on what advertising does to consumers, although it should be recognised that current thinking in relationship marketing sees communication as now being much more of a two way iterative process, as the quality of the bond between customer and firm is constantly monitored and reinforced (Cram 1994 pp15-31; Peck et al., 1999 pp33-111).

There are parallels here with conventional marketing planning terms, in that these

represent universal categories which it is also assumed can be imposed on organisations. Alternatively in practice, what is needed is,

"...a form of analysis developed by sociologists that would focus on the process by which marketing managers construct their own interpretations of marketing realities and develop individual styles of management and decision making." (Kent 1986 p145)

Much of the existing research literature on marketing planning indicates that there are a significant lack of empirical studies on strategy, utilising a qualitative methodology. Exceptions include Robbins (1991) who adopts a case study approach and Greenley (1987), who attempts to explore managerial perceptions of marketing planning, yet even this is done within the constraints of a semi structured questionnaire. The majority of research into strategic marketing planning at present is reflective of positivism and its methods. The approach is largely quantitative, utilising a questionnaire and a survey based methodology. Typical of this is the work of Greenley and Bayus (1993), and of Greenley (1982; 1983). An example exemplifying this approach is the work of Greenley and Bayus (1993), who used a structured questionnaire to determine a range of answers to marketing planning issues.

In their research, a reluctance exists to question the way in which marketing planning is conventionally presented as a universal phenomenon. Instead, we are left with a set of descriptions about the use or non use, of marketing planning decision tools and given little idea about the actual processes involved in making marketing decisions. The study by Morrison and Wensley (1991) also uses a questionnaire as the main tool of research. This tends to reflect a view of marketing which imposes categories of thinking on practising managers; the latter may have very different perceptions of marketing planning to researchers, which cannot be effectively revealed through the use of a structured questionnaire, only showing that managers do or do not use, the traditional decision making tools.

There is, as an alternative, a need to look at the experiential soft truths for marketing managers in order to understand the contingent and on going practices of everyday

life that surround them in organisations. Interestingly, McDonald (1996) indicates that he believes that more quantitative research into technique usage will not further the interests of marketing. If the rational linear model and its attendant tools are not being utilised, then organisations are not working in the way a significant number of marketing academics believe them to be. McDonald (1996), suggests that many managers in companies want to implement marketing plans, but frequently these simply do not materialise in the way suggested by classical marketing theory. This is the case probably as a result of the conventional academic approach to marketing planning. The latter based as it is on systems theory, sees the organisation as a reified, goal orientated entity that operates on, rather than through people. As Boden (1994 p29) points out,

"Social actors are barely glimpsed and are almost always presented as highly controlled by the collectivities of which they are an seemingly an unwitting part."

A phenomenological approach would be a relevant way to examine the subjective experiences of marketing managers and bring closer a questioning of the way in which marketing planning is dealt with in the vast majority of texts. Kent (1986), argues for more research located in individual perceptions of marketing. There is he postulates, a need to move towards an understanding of the ways in which marketing managers perceive, justify and attribute meaning to the courses of action they pursue. Kent (1986 p150), in criticising the reification and objectification of the four Ps notes that,

"A useful approach is one developed by sociologists which emphasises that individuals as they interact with others in their everyday lives construct meanings, which for them represents the world."

What is needed is more research aimed at exploring the subjective world of marketing managers, in order to uncover the realities of marketing for them. Possibly, this may bring into sharp focus issues related to the validity of what stands as contemporary marketing knowledge, which is perhaps less immutable than a number of marketing authorities may think, as Brownlie and Saren (1995 pp621-622) point out.



"Marketing knowledge is not a fixed set of irrefutable beliefs, but a body of provisional ideas which can be subjected to the scrutiny of analysis just as much as any data set."

What is required is research aimed at uncovering what really happens in organisations and if this means questioning some of the basic tenets of conventional marketing theory, by way of a phenomenological approach, then this might appear to be a reasonable way to move forward. The systems based view of marketing fails to capture the reality of a social world that is intensely complex and interpretative. It might be the case that the words of Piercy are very close to the truth for many managers. Research carried out by Piercy (1997 p3) suggests that,

"There is a small problem with the conventional marketing view of how companies take their products and services to a customer - it assumes and relies on the existence of a world which is alien and unrecognisable to executives who actually have to manage marketing for real."

## **2.7. MARKETING THEORY AND MARKETING RELATIONSHIPS**

The study of theory is central to marketing understanding (Howard et al., (1991), and is extensively debated. In the context of this, it is not only a phenomenological perspective that offers up a critique of traditional marketing theory frameworks. Brown (1996) has noted that over the years there has been a considerable flux occurring in marketing theory. Brady and Davis (1993), suggest that the old marketing theories based on traditional customer segmentation will not give answers in the new competitive environment. Webster (1992), points out that the narrow conceptualisation of marketing as a profit maximisation issue, based around a series of transactions, is out of touch with developments based on long term customer relationships. The strong argument is being made that a paradigm shift is taking place, with the advent and implementation of relationship marketing. It is argued that relationship marketing based on the building of long term customer retention is

replacing the conventional wisdom associated with the marketing mix and conventional marketing planning Payne et al.,(1995 pp1-31); Cram (1994 pp3-13);Gronroos (1994);Christopher and Baker (2000).

The argument is that transaction based marketing is being replaced by relationship strategies see Barnes (1994); Bodie and Coviello et al., (1997). These strategies focus on the life time value of desirable customer segments and the development of other substantial external associations with for example, suppliers and distributors. Christopher et al., (1991 pp12-15), put forward the argument that the increasing sophistication of customers means that more attention must be placed on building customer service and Clark (2000), indicates the need for a new expanded marketing mix in order to accommodate this change.

An additional dimension of this area of marketing relationships is presented by the notion of stakeholders and the key role they are supposed to play in terms of organisations gaining advantage in the market place. The argument is put by Fill (1999 p120), that success comes to companies who win the support of all those parties, for example suppliers, the local community and distributors, whose actions effect it's performance. Zinkham and Pereria (1994) postulate that these stakeholder groups are pressuring organisations to place more emphasis on social causes, such as green and ethical issues. Whittingdon (1993 pp122-31) suggests that sudden changes in the stakeholder environment brought about by a crisis will quickly render strategic plans unusable.

Webster (1992) also points out that organisations are changing rapidly in the context of relationships. There is an increase in joint ventures and strategic alliances which has led to a blurring of boundaries between companies. Gummesson (1996), refers to these as imaginary organisations, with the traditional notion of what constitutes the external environment as having altered radically. Evidence for an increase in the quantity and intensity of strategic partnerships is also presented by Glaister and Buckley (1994). Webster (1992) suggests that a new conception of marketing will

focus on managing these strategic partnerships globally, where the firm is positioned between vendors and customers in the value chain. The intention will be to provide a superior level of value to customer groupings. These changed circumstances indicate a waning of importance in the conventional model of the four Ps and the strategic marketing plan attached to it. Increasingly, marketing is seen to be developing in the context of relationships, and these relationships demand team working, quality and service (Zinkham and Pereira 1994).

McDonald (1998 pp46-47), argues that some of the newer concepts in marketing must be treated with caution. For McDonald, organisations should not lose sight of essential strategic priorities associated with marketing planning, like portfolio summaries, swot analysis, clear marketing objectives and strategies. McDonald's view is of a universal marketing theory which can be seen as a constraining influence on research, predetermining key marketing variables and how they should be perceived by managers, see Waterschoot and Bulte (1992). What is suggested is that research starts instead from the grounded experiences of managers to see if they in fact perceive the traditional paradigm as valid (Gummesson 1999 pp254-258).

Moller and Halinen (2000) and Wensley (1995b), indicate that another dimension to the domain of relationship marketing exists, being the study of business networks. Here, there is an attempt to explain exchange behaviour in the context of how groups of relationships evolve within markets. Parties to a network, which are individuals and firms, may all be active. There exists a strong degree of mutual interdependence between the actors and their respective organisations. Unlike in prescriptive marketing theory, in network approaches there is a strong normative component. Networks have as their focus relationships as they currently exist, rather than as observers think they should exist (Ellis and Mayer 2001). Consequently, views of strategy and strategy execution as espoused by the traditional view of marketing, become problematised.

For network theorists, systems and systems imperatives are not the sole drivers of action. Importantly, the area of networks is not then just about the study of structures

and institutions, but also about individual action within a network (Ellis and Mayer 2001). In attempting to resolve the connectedness between these two areas, between structure and agency in networks, Ellis and Mayer (2001), draw on Giddens (1984 pp281-288) theory of structuration. This theory seeks in the context of networks, to reconcile the existence of objective institutions with the voluntaristic actions of individuals. As such, structuration theory and the network approach to markets represent a useful tool in examining the lived reality of decision making in organisations.

## **2.8. PHENOMENOLOGY POSTMODERNISM AND MARKETING**

If in this chapter we are considering philosophical and theoretical developments pertinent to marketing, then what cannot be ignored is the postmodernist movement. This is due not only to the impact of it's thinking on marketing, but also because of an apparent relationship with phenomenology and the latter's methods. Importantly, postmodernism is of interest here, because it is seen by some commentators to be closely associated with the interpretivist, phenomenological paradigm, (Hill 1993). Postmodernism emphasises the importance of local forms of knowledge and the role of relativity in understanding (Lash 1990, pp3-7). As a consequence, a number of writers have placed phenomenology within the post modernist position, as Brown (1995a p144) has noted. The suggestion is then, that for both perspectives, phenomenology and postmodernism, there exists no substantive meta-language by which we can evaluate competing claims about science, truth and rationality.

In general terms, postmodernism argues for the existence of a new type of society which has gradually replaced the modernist structures of the early and mid part of the twentieth century (Coyle 1994). It is postulated that the old certainties associated with the search for universal truths no longer presents a valid intellectual project and this applies as much to marketing as to any other modernist endeavour (Brown 1994). Marketing planning and its tools are seen as attempts to promote false universal truths

with many of the former's techniques being highly questionable in practice (Brown 1995a p47). Much of the thinking associated with the postmodernist movement is sceptical of logical rational approaches which try to objectively explain the workings of society. Understanding is,

"...both local and contingent and there are no standards beyond particular contexts via which we may judge their truth and falsity." (May 1997 p15).

On a broad basis, postmodernism can be characterised and explained in a number of ways, but perhaps the most fundamental point it makes is that significant change is occurring in contemporary society (Haralambos and Holborn (2000 p16). There is, in the arts, a postmodernist reaction against the modern movement of the first half of this century, in that all other traditions are seen as having some merit and there is no artistic orthodoxy or single overarching style (Brown 1996). A second key strand relates to a series of significant post war developments which characterise the post modern condition. For example, in the social sphere, the gradual demise of organised religion and the decline of traditional party politics, alongside the growth of media and new forms of communication, are purportedly indicative of postmodernism. Economically, changes to a postmodernist society have occurred with the emergence of post Fordist production techniques and the knowledge society, which have superseded the mass production, low skill methods prevalent in the factory of the early part of this century Giddens (2000 pp674-5).

Additionally, postmodernism as a perspective is characterised by three shared assumptions, the death of the subject, the repudiation of shared meaning and the denial of progress (Brown 1996). Postmodernism is predicated on a repudiation of the deterministic and static world view of modern science, in preference to a new paradigm based on principles of uncertainty and indeterminacy. For writers like Barthes (1993 pp109-59), language does not reflect reality, but actually constitutes it. Language is involved in the construction of reality, where the meaning of a literary text does not derive from its author or creator, but from its readers, who are free to generate a multiplicity of different meanings.

In terms of marketing, the traditional modernist emphasis on analysis planning and control is replaced instead, within a postmodernism characterised by intuition and spontaneity. This can be contrasted with the modernist search for right textual meanings (Brown 1996). The modern endeavour to develop rational science and objective knowledge is challenged by postmodernism, the implications being that the apparent universal laws of organisational systems and the absolute truths of conventional planning, are nothing more than totalising systems of thought. May (1997 p16) captures this perspective in the notion of 'anti foundationalism'. It is argued that scientific claims about truth in the social and natural worlds have little relevance and the world is devoid of major, unifying meaning systems.

Brown (1995a p146), notes that writers like Habermas, Adorno and Marcuse can be characterised as political postmodernists, they are the critical theorists, based within the Frankfurt school. Committed to a form of neo Marxism and the emancipatory ideal, they have attempted to 'unmask' the iniquities of capitalism by suggesting that there is a manifest disparity between marketings outward intentions of customer care and the practical outcomes of customer manipulation and exploitation. Arguably, this approach falls into the trap of 'grand theory' and we have again, a set of general observations. In the fashion of systems theory, there is a set of universal goals and universal needs in people, waiting to be freed. In the case of critical theory, the state and marketing are viewed as structures of domination, rather than as mechanisms to bind society together (Alvesson and Wilmott 1996 pp43-67). The latter have developed a modified approach to critical theory, using it as tool to examine current management methods with the aim of reconstructing them, in the interests of an improved reflective practice.

Brown (1998b p78) points to the prevailing agreement that postmodern culture is essentially novelistic in tone and style. If this research study is examining the stories of marketing managers, then this endeavour can be seen to be related to postmodernism as well. Gabriel (1998), points out that postmodernism sees stories in all places, with

narratives being the favoured objects of discourse. For Gabriel (1998), stories and experience are inextricably linked and in organisations, stories appear to sweep away all other explanatory devices. An example of this is supplied by Clark and Salaman (1996), who point out that management consultants appear to successfully satisfy and retain their customers through the telling of stories. For Gabriel (1998), stories come to the rescue of meaning in the information over-loaded organisation.

It is argued that postmodernism affects all areas of social and economic activity to include marketing. In the post modernist approach to marketing, symbols signs and images are a fundamental aspect of society Elliott (1999); Tornros and Ranta (1993). For Firat et al.,(1995), marketing practice that is likely to succeed takes image as being primary. Cited as an example of this phenomenon is a commercial. When deprived of Pepsi in an isolation chamber, the super model Cindy Crawford turns into ugly duckling Rodney Dangerfield. The implications are that minus the potency of the product image, the attractive consumer crumbles. The image is the marketable entity, an entity that is not represented by an analysis of simple material product features and an accompanying marketing mix. For Tornroos and Ranta (1993), marketing in a post modern era is all about the creation of images. They believe that, as opposed to classical micro economic theory, marketing as image management explains more fundamentally how markets operate, in a situation that is complex and heterogeneous.

Brown (1995a pp106-7), encapsulates the postmodern marketing phenomenon in the framework of de-differentiation, hyperreality, chronology, pastiche, anti-foundationalism and pluralism. Fragmentation is evident with markets splitting into smaller and smaller segments, accompanied by the collapse of the mass market. For Firat et al.,(1995), the traditional variables that are used in explaining consumer behaviour are no longer useful. The contemporary actions of purchasers suggest that the need for a consistent identity is on the wane. Consumers frequently change their self concepts, characters and often subscribe to contradictory value systems and lifestyles. Firat et al.,(1995), point out that the post modern consumer is a fickle one

and brand loyalty is disappearing as a result.

For Cova (1999), there is another alternative aspect to the post modern condition. Where other views present consumers as essentially unclassifiable agents that are for ever eluding traditional marketing segmentation analysis, Cova (1999), re-establishes a social dimension. While symbols are still seen as highly significant, they are not there for the service of socially disconnected individuals, but act rather as a 'linking value' (Cova 1999 p78). The post modern consumer is looking not only for a product that will make them freer, but for one that will link them into a community, to a 'tribe'. The product takes on a social role, embedding the individual consumer in a collectivity. The success of innovations, for Cova (1999), can be judged by the extent to which they contribute to the communion of individuals and are adopted by one or more tribes.

Returning to Browns' (1995a, pp106-7) framework, de-differentiation, involving the erosion and effacement of established hierarchies, is also evident for postmodernists, with the blurring of once clear cut marketing boundaries. There are now 'edutainments' in computer games and 'infomercials' for individual products. Additionally there is the retailers tendency to sell beyond their traditional product range, combined bookshops and restaurants and where supermarkets sell financial services. De-differentiation is also present in advertising and television, where the former has its own array of soap operas, like the Gold Blend commercials (Brown 1995a pp110-4).

Hyperreality is exemplified by the loss of a sense of authenticity and the becoming real of what was once a simulation Brown (1994). This is evident in the dream worlds created by theme parks, restaurants, shopping malls and hotels.

"Just down the strip from the MGM is the second largest hotel in the world, the Excalibur hotel with a mere 4,000 rooms as well as a draw bridge, turrets, battlements, indoor jousting, fire breathing dragon, Sherwood Forest cafe, Camelot restaurant, Robin Hood's Snack Bar, Little John's Snack Bar..." (Belk (1998 p94)



For Firat et al., (1995), it is not only consumers who buy into hyperreality, but marketers as well. They cite the example of Disney, where the fantasy vision is not consumer derived, but completely worked out by designers, employees agents and reviewers, all of whom buy into that creative and imaginative world. Brown (1995a pp106-7) notes that chronology represents a concern with the past and representations of the past, where marketers plunder it for products, for example sixties and seventies revivals in popular music. Pastiche consists of a collage of available styles, a mixing of codes in a parody. The latter phenomenon is apparent in much current advertising, with the emphasis on irony. Some commercials are humorous at the expense of other campaigns.

Finally for Brown (1995a pp107) there is anti foundationalism, which is very significant in terms of postmodernism generally and returns us to the major themes outlined at the start of this section. In anti foundationalism, the emphasis is on antipathy to systematic generalisations, like formal marketing planning systems, which act as totalising meta-narratives (Brown 1995a p12). In post modernist discourse, the emphasis is on pluralities and on 'narratives' rather than on the one overarching world view Toornros and Ranta (1993). Traditional marketing planning systems can be seen then, through the perspective of post modernism, as an out moded view which cannot capture the complexities of the present.

In general terms, there exists a range of influential perspectives which relate to the notion of a marketing orientated firm and to post modernism's concern with the consumer. One example of this is in the work of du Gay and Salaman (1992). They point to the increased influence of an enterprise culture on society and to a developing 'cult' of the customer in firms. Not all agree however, that organisations and society are moving entirely away from Weber's notion of orderly, rational bureaucracies, see Giddens (1971 pp169-184). Instead, Ritzer (2000 pp11-14), argues that we are seeing the 'McDonaldization' of society. This represents the process by which the principles of the fast food restaurant come to dominate all sectors of society. Ritzer sees the four

guiding principles of the McDonalds restaurants, efficiency, calculability, predictability and computerised control, as having a significant influence on social development. These features can be seen as being very characteristic of modernism and the assembly lines of Fordism, the latter as outlined by Lyon (1994 pp119-133).

Ritzer (2000 pp24-26), uses his four principles to argue that our society and its organisations are becoming even more rational over time, to become an iron cage which controls the consumer in predictable and sometimes adverse ways. In terms of marketing, the four guiding principles of McDonaldization would seem to lend themselves very much to the established and modernist view of planning strategy.

Ritzer (2000 p184), points out that the degree to which post modernism is viewed as a successor to modernity, does imply that it must stand in opposition to the McDonaldization thesis. He does however, go on to suggest that modernism and post modernism now exist side by side in society, with McDonaldization incorporating both these elements. Ritzer (2000 pp184-191), argues that although McDonaldization features aspects of modernity, like Fordism, with for example fast food restaurants being based on the principles of the production line, post modernism is also visible. He sees this visibility through new forms of consumption, which have come into existence since the end of the second world war. With these new forms of consumption, like shopping malls, cybermalls and fast food restaurants, has come the progressive 'enchantment' of the consumer, through simulation and 'magic'. Ritzer suggests that we are drawn to the magic of McDonalds ability to serve our food almost instantly and also to phenomenon like the fake, but enchanted worlds of Disney and Las Vegas. For Ritzer then, the post modern condition exists, but it is underpinned by an increased level of rationality, as organisations seek to manipulate the means of consumption. Whilst it has to be recognised that elements of modernity do exist then, society can also be characterised and explained by a new and sometimes diverse post modern order, see Seidman (1998 pp225-51).

## **2.9. POSTMODERNISM, MARKETING AND QUALITATIVE RESEARCH**

In some ways, the analysis of current marketing theory by Brownlie and Saren (1992) comes close to being a postmodernist critique as it reflects a number of the issues dealt with in the previous section. Brownlie and Saren (1992), believe that the original marketing concept and by implication traditional marketing planning, offers firms the chimera of market success through the adoption of a totalitarian marketing philosophy. The precepts and prescriptions of marketing need rethinking they suggest, in order to become more flexible and less constrained by the current paradigm which views the discipline in terms of objective laws.

"Adherence to the mainstream ideology constrains the development and adaptation of marketing thinking because to question or adapt too much breaks it's key articles of faith and is thus regarded as treacherous." (Brownlie and Saren 1992 p45).

What we need to consider then are actual ways in which research into marketing can be dealt with, which move outside traditional assumptions. Certainly, postmodernism offers a different perspective. In terms of actual research methods, most forms of postmodernism principally employ the technique of deconstruction (Brown 1995b). The intention of interrogating texts and other cultural and social phenomenon, is to demonstrate that there are no hidden truths and that there are no fixed or correct interpretations. The works of novelists and film makers can provide valuable insights into the nature of marketing and consumer behaviour, possibly as much as the conventional market researcher armed with a battery of survey instruments (Brown 1995c). In postmodernism, virtually anything can be considered a text, for example fashions, films, advertisements and marketing theories, which means that the potential applications of deconstruction are widespread.

This is where it can be argued that in terms of method, qualitative methodology departs from postmodernism (Brown 1995b). The former is concerned about representation while the latter is not; for postmodernism, the very notion that one meaning or interpretation is better than others is clearly part of a discredited notion

concerning the inevitability of progress and a belief in superior concepts (Brown 1996). Whilst postmodernism is clearly reluctant to be representational, qualitative research is. As part of a scientifically orientated endeavour, qualitative research seeks to understand reality from the perspectives of those being researched (Bryman (1988, p61); (Moustakas 1994 pp155-8). For Kent (1998), postmodernism does make possible a philosophical basis for further adaptable approaches to marketing and it moulds in well with the idea of local narratives, be it customer or organisation based. The extreme relativism inherent in post modernism is seen as worrying however by Kent (1998). He believes that post modernism makes research impossible and not worthwhile, since findings cannot be evaluated against others. This view is perhaps questionable, as postmodernism employs along with deconstructionism, the methodology of personal introspection, Brown (1998b pp242-44), which arguably does have the potential for some form of comparative analysis, with its concern for individual accounts. Phenomenology does view comparisons as important, (Moustakas 1994, pp121-154), particularly between the studies respondents.

Whilst it is possible to distinguish between postmodernism and phenomenology on the grounds identified by Brown outlined above, it is clear that there exists an important relationship between the two areas, an influential relationship that is acknowledged by this study. Berger and Luckman (1966 pp27-28), who are commonly recognised as being very strongly influenced by phenomenology, talk about the social construction of reality, an issue that is central also to the post modern inquiry, see Gergen (1999 pp115-141). The social construction of knowledge perspective within post modernism, represents a concern with the interpretation and negotiation of meaning in the social world, a point that preoccupies phenomenology as well.

Both perspectives, phenomenology and post modernism, question universal meta-narratives, emphasising instead the importance of local contexts. There exists in both approaches, a focus where knowledge is seen to be certified through practice and where there is an openness to a multiplicity of meanings. The qualitative in depth interview, to be discussed in more detail later, is the method of research adopted by

this study. It can conceivably be seen to be appropriated by both post modernists and phenomenologists, as it represents a 'construction site of knowledge' (Kvale 1996 p42). In this 'construction site', knowledge takes form through language, narrative, context and dialogue (Kvale 1996 pp42-43). In writing about marketing management, the construction site metaphor is also used by Hackley, who also argues for a more qualitative based agenda when researching into marketing (Hackley 2001a p12), a theme which is taken up by this study.

In elaborating on this issue, what is needed, it is argued here, is a way to clarify that which is distinctive about the process of making and executing decisions about marketing in organisations. Watson (1994 pp7-8), suggests that we need to develop concepts for describing and explaining managerial work and that intensive qualitative research will help us try to understand the constructs that individuals use to think about their jobs. The case is made by him that there needs to be more ethnography used in management research, as we really do not know enough detail about what is involved in the practice of management. In this study, the research to be undertaken is proposing to investigate life in organisations from a subjective perspective, looking at what people are actually doing and saying. It will try to account for the processes through which members of the organisations under study construct their everyday lives in the context of planning for marketing.

In essence, the building blocks of any organisation are the individual perceptions of reality held by members. Of crucial significance to this inquiry, is the ethnomethodologists concern with language and meaning in situations (Hassard 1990). Greenfield summarises this view when he states that,

"Thus the concept of organisations we are dealing with here is not a single uniform entity but a multi-faceted notion reflecting what the individual sees as his social world and what meanings and purposes the individual brings to or takes from that reality." (Greenfield 1989 p85).

The overriding assumption of most conventional academic marketing material is that there exists only one true way to conceptualise and practice marketing. As an

alternative Kent (1986), suggests that rather than accepting the dogma of the marketing textbooks and the purported efficacy of the four Ps, these are treated as contestable and as hypotheses to be examined. The intention of the subsequent study is to work within this perspective, through the utilisation of phenomenology and its attendant research method which is the in depth interview (Moustakas 1994, p114). In the next two chapters, the philosophical and methodological issues relevant to phenomenology and this study, will be dealt with more extensively.

## **CHAPTER THREE**

### **PHENOMENOLOGY, MARKETING AND QUALITATIVE RESEARCH**

### **3.1. QUALITATIVE RESEARCH PERSPECTIVES**

The previous chapter considered some theoretical issues related to marketing. Later, it outlined the influence of post modernism on our understanding of society and this study. The chapter here begins by examining some qualitative research perspectives that arguably have a great deal in common with phenomenological research and which also have been very influential in this project. Phenomenology is a term which is widely used in social science research, often employed to denote the philosophical basis of a particular study. Bryman (1988 p53) notes that to designate a particular piece of research as phenomenological, sometimes means no more than expressing a commitment to attending to actors points of view and the meanings they attribute to their behaviour. However, whilst phenomenology does have commonalities with other qualitative research genres, there exists some distinct differences, as noted by Moustakas (1994 pp21-22) and Goulding (1999).

Qualitative research can be seen as involving a complex family of terms, concepts, phrases and underlying assumptions. A wide variety of qualitative research genres exist, see Marshall and Rossman (1999 pp105-132); Hammersley and Atkinson (1995 pp23-53); Miles and Huberman (1994, pp5-7). Bryman (1988 pp69-70), believes there is a considerable overlap between the various qualitative approaches, a point made by Silverman (1993 pp27-29). Bearing in mind the evident complexities of the issue, it is not the intention here to evaluate these typologies or to examine all the different qualitative research perspectives that exist. From the point of view of this piece of research, related qualitative perspectives that are seen to be particularly important are ethnography, grounded theory and ethnomethodology. As a consequence, these will be examined and their influence on this work considered. This chapter will then go on to outline in more detail the nature of the phenomenological research method adopted for investigating marketing planning in organisations.

In general terms, qualitative research can be characterised as being pragmatic, interpretative and grounded in the lived experiences of people. Qualitative research emphasises seeing things through the perspectives of those being studied (Silverman 1993 p24). There is usually a rejection of the imposition of rigid concepts and theories in advance, as noted by Bryman (1988 pp66-7) and Silverman (1993 p26). Qualitative research can be typified as being naturalist (Miles and Huberman 1994 p5). There is usually an intense or prolonged contact with a life or field situation. Additionally, the



qualitative approach tries to account for how people make sense of their situation, recognising that many interpretations of situations, experiences and materials are possible (Miles and Huberman 1994 pp6-7).

Certain themes are isolated in fieldwork and researchers attempt to gain a holistic view of that which is being studied. The qualitative researcher tries to capture data on the perceptions of local actors, through a process of deep understanding. There is usually an attempt to suspend preconceptions about what is being researched as well. In addition, there is little standardised instrumentation, at least at the start of the research project. Most analysis is done with words and these are then organised to facilitate analysis (Miles and Huberman 1994 p7). These words are based on observations, interviews or documents and the data collection activities are typically carried out in close proximity to a local setting for some considerable period of time (Burgess 1984 pp59-61). The data is not normally immediately accessible for analysis, but requires some processing, for example, raw field notes need correcting and editing. The latter must also be typed up and tape recordings may need to be transcribed and corrected.

Despite these evident similarities, differences do exist between approaches. For example, ethnography uses multiple data sources, with an emphasis on interviews and observations, supplemented by diaries and artefacts (Hammersley and Atkinson 1995 pp124-74). On the other hand, ethnomethodology usually focuses exclusively on conversation analysis. Interviews are an infrequent part of ethnomethodology. Ethnomethodologists are seen to be,

"...rarely using interviews as a way of gathering data. Instead, ethnomethodologists tend to concentrate on purely 'naturally occurring' settings which are observed and/or recorded first hand." (Silverman 1993 p106).

For ethnomethodologists, interviews are seen as social constructs, not revealing much more beyond the interview itself about the nature of social reality. Alternatively, for phenomenologists, it is the interview which is seen as the primary and usually, as the only method of research, as it accesses the deep meanings and perceptions of those being studied regarding their life world (Moustakas 1994 p114). Phenomenological interviewing focuses on the lived meanings that events have for individuals, assuming that these meanings guide action and interaction (Marshall and Rossman 1999 p113).

It is this method which forms the tool for data acquisition in this study of marketing planning in organisations. Rather than using phenomenology as a broad term which embraces the entire qualitative perspective, it has to be seen as a distinct methodology in its own right, see Moustakas (1994 pp11-16) and Goulding (1999).

In terms of qualitative analysis, grounded theory, if used properly, draws on a range of codes and categories of a general nature to explicate data (Glaser and Strauss 1967 pp124-5). Alternatively, the phenomenologist will search for essences that may or may not transcend the individual situation (Hycner 1985). Phenomenologists are very wary of coding and categorising data (Miles and Huberman 1994 p8). This is seen as leading to simply the counting of what are complex, multifaceted social meanings (Giorgi 1994). In general terms, The case study is usually regarded as being an important method in obtaining some forms of qualitative data. Case studies are often seen to be ethnographic, where a few local settings are studied in an in depth way using a variety of qualitative research instruments (Gill and Johnson 1997 pp119-127). However, there are examples of case study research which have moved away from the ethnographic tradition, gravitating towards the building and testing of theories (Yin 1994 p27). Here, theoretical presuppositions are stated at the outset of the inquiry.

It must also be recognised that some of these qualitative research methodologies can be seen to reflect different underlying theoretical perspectives (Marshall and Rossman 1999, pp2-8). They cannot all be conveniently subsumed under the phenomenological label, despite the attempts of a large number of researchers to do this (Bryman 1988 p53). Ethnography for example, is based on interactionist principles where there is a concern with the creation of symbolic orders through social interaction (Goffman 1959 pp32-40). Goffman (1961, pp1-72) centred much of his work on the self identity of mental patients and also on how individuals in society deal with the presentation of self in verbal exchanges with others. In interactionism, there is a concern with identity creation and the role of the symbol in this process. Ethnomethodology is less concerned with symbols and more with what people are actually doing. Hassard (1990), sees this as a concern with the commonplace world of every day lived experience. In ethnomethodology, it is widely recognised that there is a strong input from phenomenology (Heritage 1984 pp36-74) and a focus on the meaningful nature of the social world. As a consequence, some of the concerns of ethnomethodology are

seen as being significant to this particular study. We can now consider some of these major qualitative approaches in more detail.

### **3.2. ETHNOGRAPHY AND GROUNDED THEORY**

Ethnography is concerned with carrying out extensive field work and can be pursued in a variety of settings that allow for direct observations of the group being researched. Ethnography makes possible an examination of the communications and interaction within a group. A key feature of the ethnographic approach is that it is based on naturalistic modes of inquiry (Hammersley and Atkinson 1995 pp3-16), within an inductivist framework. Ethnographic inquiry results in cultural description, but description that can only emerge from a long period of intimate study within a given social setting. The commitment to naturalism means that in order to explain the actions of people in organisations, it is essential to arrive at an understanding of the various cultures and subcultures that exist in organisational contexts.

Critically, ethnography calls for intensive work with a few key informants drawn from the setting of the study (Moustakas 1994, pp1-4). The ethnographic approach is fundamentally that of anthropology, see Fielding (1993); Gill and Johnson (1997 p113). The intention is for the fieldworker to draw a representational picture of the way of life of some human group that interacts in a given context. The researcher is allowed to use the socially shared knowledge available to the participants of the study, in order to account for observable patterns in human life. The focus of ethnography then, is on the manner in which people interact and collaborate. It is necessary therefore to be involved in the on going daily world of those being studied (Fielding 1993).

With regard to method, ethnography principally employs the techniques of participant observation and unstructured interviewing, in the process of inquiry (Hammersley and Atkinson 1995 pp131-51). Ethnographic research can also involve the collection and analysis of artefacts and documents, like diaries. The technique of participant observation can range from totally observing the events under study, to having some form of role in them. The emphasis is on attempting to draw out what a phenomenon looks like from an insiders account and describing this from the respondents point of

view. In terms of data understanding, Hammersley and Atkinson (1995 p228), note that analytical concepts may be used by the research subjects themselves. There is then a recognition that in order to be cognisant of the context and reality of the research situation, it is required that analysis cannot be meaningful, unless the experiences and perceptions of the subjects figure prominently.

Some social scientists have used the term symbolic interactionism to represent the different types of research that involves work in the field, to which qualitative research generally is sometimes referred Manning (1992 pp18-19). Blumer (1969, pp6-21), in describing symbolic interactionism, suggests that social actions are based on the meanings we attribute to them, where meaning itself is derived from social action and these meanings are modified in interaction with others. Weick (1995 p41) notes that symbolic interaction is the unofficial theory of sense making, because the former keeps in play a set of characteristics to do with the self, like action, interaction, interpretation and meaning. Clearly then symbolic interactionism can be seen as being linked closely to the phenomenological perspective.

There are three main approaches to gathering field work data in ethnography, these being observation, participation in the setting and gathering reports from informants (Gill and Johnson 1997 p97-111). The ethnographer can be a complete observer who relies on organisational documents, to a situation where the observer having a participant role, relies particularly on interviewing informants about events that the researcher has been unable to observe. Becker (1958), points out that the participant observer gathers data by joining in the daily life of those being studied and then examining the situations they find themselves in. The researcher can enter into conversation with some or all of the participants and uncover their interpretations of events. The researcher can therefore obtain accounts of situations in the language of the participants, giving access to concepts and frames of reference used in everyday life (Goffman 1974 p13). Participant observation is concerned to understand the "sense assembly equipment people use to construct and sustain their everyday lives." (Cuff and Payne 1979 p178).

We can now consider grounded theory. Goulding (1999), notes that it is important that those working from within the qualitative perspective understand how grounded theory differs from the phenomenological method. One important difference between

phenomenology and grounded theory is that the former has only one legitimate source of data, and that is the experiences and views of respondents. Grounded theory on the other hand, can use multiple sources of primary and secondary data (Goulding 1999). In essence, grounded theory is a method of generating theory which is embedded in the data of the study (Haslam 1997). Theories are derived from the field work process and elaborated into higher levels of abstraction, usually after the data collection phase is complete. The grounded theory approach has the ability to cope with the unstructured complexity of organisational reality. Analytical categories can be developed which are meaningful to the subjects of the research, as it is their perceptions and experiences which form the basis of the inquiry.

An alternative approach is to use analytical induction (Silverman 1993 pp160-2), where specific hypothesis are developed at the outset of the research. Cases are then examined to determine whether or not they fit with the hypothesis. If they do not, then the latter must be reformulated and tested again. This approach encounters the problems faced by positivist research, in that it may prejudice the ability of the researcher to see things through the eyes of the subject (Bryman 1988 p48). The researcher working within the qualitative, grounded theory perspective needs to know what is happening in organisations from the perspective of those being studied. Imposing a set of hypothesis on complex, wide ranging sets of circumstances may restrict the ability of the researcher to realise this aim. Additionally, analytical induction cannot deal very well with unanticipated events.

A key issue in any piece of research is the nature of the sampling methodology that is selected by the researcher and this includes the grounded theory approach. What organisations will be examined for research, who within them and on what basis will they be selected? Whilst the positivist research tradition is concerned to establish that the respondents are representative of a wider population, this sampling logic does not apply particularly well to grounded theory (Glaser and Strauss 1967 p121). Used instead, is the process of theoretical sampling. There is not the need to give undue attention to generalisable sampling techniques, but to judge whether what is examined will assist in the process of theory generation, which relates to the cases under consideration. The intention is to determine for what purpose the units of inquiry are being used. The recommended approach of theoretical sampling involves selecting subjects for study on the basis of concepts which are grounded in the data,

having some proven relevance to the evolving theory.

The possibility does arise that the results and propositions from a grounded theory study can be examined by other researchers using the comparative case study method (Hammersley Scarth and Webb 1985). Case can be compared with case and this could contribute to a fuller understanding of the phenomenon. Comparisons may help to establish some sense of the representativeness of a particular investigation against other situations where the issue is being studied. While this seems an admirable aim, what this approach fails to recognise is that each research situation can turn out to be very different, and it is difficult to replicate the specific data collection process. This does not mean that the findings are worthless however. As Hammersley and Atkinson (1995 p226) point out, there is no such thing as true or false data, only data.

"It is not a matter of accepting or rejecting data, but rather of knowing how to interpret them."

In this study on marketing planning, it may be that the explication of differences from broadly similar inquiries may prove to be one of the most illuminating features of the research activity.

### **3.3. ETHNOGRAPHY, GROUNDED THEORY AND THE CASE STUDY**

When discussing case study research, in some instances it is apparent that an intense blurring occurs across the boundaries that separate the various qualitative research traditions. For example, Bryman (1988 pp87-88), notes that some researchers treat qualitative methods and the case study method as being more or less synonymous. Burgess (1984 p2), suggests that ethnography can also be referred to as case study research. It is possible then to see the words 'case study' as being an umbrella term covering a variety of approaches that allow the researcher to focus on a specific situation. For Stenhouse (1977 p12) when providing advice on research, the term case study appears to have a more narrow focus.

"...two principle lines of method open to you. One is the ethnographic tradition of participant observation. One which I call the historical tradition, is that of gathering oral evidence by interview."

Yin (1994) takes an altogether different perspective on the issue of the case study. He points out that the term case study must not be confused with the qualitative methods of ethnographic and participant observation. For Yin, the latter are mere descriptions of events, failing to take into account proper scientific analysis. Yin believes that the case study method must begin with a logic of design, which closely resembles the deductive methodology of positivism. The case study must follow,

"... the rules of traditional scientific inquiry, data collection should be done with explicitly developed protocols and other tools external to the investigator." (Yin 1994 p20).

This conflicts with a phenomenological perspective, which recognises multiple views of reality in any social investigation. As pointed out earlier in this chapter, the most fundamental characteristic of ethnographic research is its express commitment to viewing events, actions, norms and values from the perspective of the people being studied, see Bryman (1988 pp61-63). Implicit in Yin's notion of what constitutes an acceptable approach to case study work, is the fact that the project must start with a well defined theory, which is tested against events.

"This role of theory development, prior to the conduct of any data collection, is one point of difference between case studies and related methods such as ethnography." (Yin 1994 p27).

For Yin, alternative approaches which develop theory out of a study of events, rather than using his deductively based program logic model, do not correspond with a definition of what constitutes properly acceptable case study work. It can be suggested however, that a case study provides the opportunity to develop a research study based on a range of methods, with little restriction put on the role of theory, theory development or indeed method of analysis. This opens the issue related to inductive and deductive approaches in research and is taken up by Kenny. For Kenny, (1984 p37) the case study as a method serves to " identify and describe basic phenomenon as well as provide the basis for subsequent theory development." This view is indicative of the grounded theory approach where it is acceptable to develop a theory from the study itself, during and after data collection.

For Yin (1993 p75), in evaluating the various qualitative approaches that can be used in the case study method, indicates that grounded theory is a less than satisfactory

method of doing research than the scientific method. This is because the latter involves developing specific hypotheses in advance of the inquiry, using a program logic model of research which attempts to conceptualise a series of cause and effect relationships. Alternatively, from a qualitative perspective, the case study facilitates the development of an intensive and detailed knowledge about a single case or a small number of related cases using a variety of in depth approaches, where theory is usually developed inductively. Case studies operating like this, provide the opportunity to gain a rich understanding of the context of the research and of the processes being enacted by organisational members.

### **3.4. ETHNOMETHODOLOGY**

As a term, ethnomethodology was first used to broadly mean a study of the methods used by people to construct, account for and give meaning to their social world. In ethnomethodology, there are examples of accounts of decision making in everyday life where reasoning is used in ways which are different from rational practices associated with scientific thinking (Heritage 1984 pp130-134). Silverman's work on social action theory, considered in the previous chapter, can be seen as being a basis for what is termed ethnomethodological research, see Watson (1997 p62); Thompson and McHugh (1990 p36); Hassard (1990). Ethnomethodology takes peoples pragmatic reasoning, and the way in which the social world is made sensible, as the central focus of analysis, see for example the work by Cicourel (1964 pp189-224). Ethnomethodology is concerned with the production of a commonsense world and it eschews any attempts at analysis of causation which would impose external categories (Thompson and McHugh 1990 p36). For ethnomethodology, when members make their activities accountable, they are producing and reproducing the features of social structure. In organisations, structural factors are not just historically given, but are made relevant as a local matter. Rules, regulations and operational procedure are adjusted or ignored in the actual tasks of organisational actors. The point is that the pattern of actions and reactions that constitute structures in society and organisations are changeable, situational products. What occurs is that social and organisational life achieves its recognisable and repeatable nature through the routine ability of actors to make sense of shared situations.



Ethnomethodology attempts to account for the processes through which members construct their life, in and out of organisations. From an ethnomethodological perspective, the latter are structures to be viewed at best as temporary patterns, created by interpersonal action and based on available stocks of knowledge. The problematic quality of the everyday world is central to ethnomethodology, see Hassard (1990).

Ethnomethodology denies any objective reality to social phenomenon. The suggestion is that in objective terms, there are no such things as societies, social structures or organisations as these are only conceptions in the heads of people. Benson and Hughes (1983 pp99-127) in examining ethnomethodology, point to the centrality of indexicality, which refers to the amount of shared knowledge necessary to understand a message. Indexicals are verbal and non verbal cues, having meaning which is dependent on the context of production. The meaning of members everyday talk is dependent on the context in which that talk occurs. In order to understand an utterance, we must know something about the particular circumstances in which it took place.

Ethnomethodology seeks then to understand how individuals make sense of indexicals (Hassard 1990). Ethnomethodologists also argue that social life is essentially reflexive, a point also made by Hassard (1990). Members of society and organisations constantly look at particular activities and situations in terms of what has previously occurred, making sense of the world through what they see as established patterns, recognisable to them. Here there is a very close association to Weick's (1995 pp24-5) notion of retrospect and indeed, he talks about the continuing influence of ethnomethodology on the study of organisational sensemaking. The approach used to study organisations by ethnomethodologists is conversation analysis (Boden 1994 pp17-20). As Boden indicates, conversation analysis relies on full transcripts and recordings of conversations in natural situations. Ethnomethodology, through conversation analysis, directs our attention to the ways in which we reason about and act on, our view of the world. This reflects the linguistic form of ethnomethodology, which examines the use of language and how conversations are structured. This has a different emphasis to the situational form of ethnomethodology, which is mainly concerned with how participants make sense of and construct their immediate social situation (Hassard 1990).

Having a close relationship with ethnomethodology is discourse analysis. For Silverman (1993 p120-125), the term describes a different range of social science research methods based on the analysis of talk. Silverman notes that in this perspective, utterances do not just describe a state of affairs, but perform an action. For May (1997 p128), this moves towards an ethnomethodological perspective that puts stress on what people do, where there is a concern to understand the complexities of naturally occurring talk. In a phenomenological perspective talk is action, representing interpretation and activity towards sense objects. In this way, ethnomethodology, phenomenology and discourse analysis are linked.

A key issue for ethnomethodology is talk-in-the-work (Johnson and Kaplan 1980 p353). An important task for the researcher is one related to attempting to understand how people talk to one another about their work in natural settings and how they organise this work by talking to each other. What is the nature of the reflexive talk embedded in the actual work process? Some significant studies of corporate executives and middle level managers suggest that such individuals spend a great deal of their daily routines engaged in some form of talk, whether in meetings, office interaction or on the telephone, see for example Mintzberg (1973 p35) and Moss Kanter (1977 pp1-257). Communication flows in the form of talk play a vital role and it can be argued that this is the main work of managers (Boden 1994 pp51-2). It is evident then that ethnomethodology, conversation analysis and the study of interaction provide important tools for understanding what goes on in organisations.

### **3.5. PHENOMENOLOGY AND RESEARCH: CONCEPTS AND PROCESSES**

Whilst recognising the contributions of the above perspectives, the research study here has as its focus phenomenology. This approach uses data from consciousness only, in order to describe and explain managers perceptions of what they understand marketing planning and marketing strategy to be. Some attention was given in the previous chapter to the philosophical basis of phenomenology and in this section, we consider how this can be translated into a research context. In adopting the phenomenological approach, there is a rejection in this research of any attempt to produce one over arching view of reality regarding marketing planning in particular

organisations. Instead, the research draws on the subjective world views of key personnel responsible for marketing. Whilst the focus is very clearly about accessing consciousness from a phenomenological position, the qualitative approaches considered above, provide a useful range of influential concepts to aid our understanding of social and organisational phenomena.

Ethnomethodology for example, could be applied in the sense of looking at how groupings of people relate to each other in the context of marketing (Robson and Rowe 1997). How do people talk to one another about their work in natural settings and how do they organise this work by talking to each other? This particular approach was not adopted in this study, but ethnomethodology has to be seen as a major influence here, not so much in terms of research methods, but in its search for the local logic (Boden 1994 p193-8) inherent in managers actions and their perceptions of the latter as related to marketing. In addition this study which is based on an inductive approach, is influenced to some degree by the general approach of grounded theory using its reasoning and philosophy. If we concentrate on practitioners views of the world, then marketing reality becomes grounded in their beliefs and not in some reified theory, emerging out of textbooks. What is being attempted here, in phenomenological terms, is way of "...intuiting disciplinary meanings" Giorgi (1994 p209). This is expressed in the language of the discipline, and the subsequent forming of concepts to account for the manner in which subjects relate to their organisational situation.

Observations of meetings and examination of documents, like the marketing plan, are clearly all valuable tools in a ethnographic inquiry. The idea of immersion in the cultures of companies in order to look at their marketing planning is a potentially attractive proposition. The research here is not however trying to measure and codify one real and objectively verifiable version of marketing, or is it attempting to consider competing claims about this from within the organisation. As Silverman (1970, p132) points out, there are diverse perceptions of reality within organisations. Even a dedicated triangulation exercise, as advocated by Denzin (1970 p310), would be unlikely to construct a master view of what is really going on. Reality construction is individual and surrounded by differences in values and perceptions, the latter effecting document appraisal as well.

If we are to examine marketing managers grounded experiences, then it is argued that the best way to access this is through phenomenology. The latter is knowledge as it appears in consciousness. Phenomenology describes what is perceived, sensed and known in ones immediate awareness and experience. What is utilised is only the data that is available to consciousness and the researcher is interested in the totality, the essence of the experience see Giorgi (1992; 1994). The phenomenological approach involves an understanding of experience in order to obtain comprehensive description, that provides the basis for a reflective structural analysis. This is usually obtained through the open ended interview (Miles and Huberman 1994 pp86-7). Phenomenology emerged out of a developing discontent with a philosophy of science based on material things, rather than taking into account the experiencing person and the connections between human consciousness and objects existing in the natural world. Knowledge has to be seen as coming out of self evidence (Moustakas 1994 p27). What is said to possess objective reality exists only through representation in the mind. Husserl's philosophical approach is known as phenomenology, because it utilises only data available to consciousness (Husserl 1931 p129). His philosophy is also known as transcendental, because it adheres to what can be discovered through reflection on subjective and objective correlates.

Phenomenology studies individuals perspectives on their world, attempting to elucidate in detail the content and structure of consciousness. Phenomenology involves a return to experience in research, in order to obtain a comprehensive description that provides the basis for a reflective analysis portraying the essence of the phenomena Goulding (1999). The researcher has to determine the underlying structures of an experience by interpreting the originally given descriptions of the situation in which the experience occurs. The aim is to determine what an experience means for an individual and from this, general or universal meanings are derived, in other words the essences or structures of experience (Moustakas 1994 p59). Phenomenology attempts a direct description of experience (Giorgi 1992). Objectivity is reached through an expression of fidelity to the phenomenon being investigated (Kvale 1996 pp52-55).

Phenomenology tries to understand the way a person lives, creates and relates to the world. This life world is the world as it is encountered and given in immediate experience, independent of and prior to explanation. In terms of data collection, evidence from phenomenological research is derived from first person reports of life

experiences. In phenomenology, consciousness is always intentional and always directed to objects. In phenomenology, perception is regarded as the primary source of knowledge and is a source which cannot be doubted. The object of a conscious act is inseparable from its meaning, so experience is intentional and meaning is at the heart of phenomenological understanding. Also, a key factor is the role of intersubjective knowledge. The latter is needed in coming to know someone or something, in order to verify and extend knowledge. This plays a pivotal role in the interview situation (Kvale 1996 p181). There is then, an interchange of perceptions, a continuing alteration of validity occurs, as people articulate and describe their experiences. A reciprocal correcting of reality takes place in social conversations and dialogues.

In the research process, a key concept is phenomenological reduction, see Kvale (1996 p54); Hycner (1985), which calls for the suspension of judgements. This can be pictured as bracketing, to place foreknowledge and common sense about the phenomena, apart from an understanding of that which is being described. Phenomenological reduction cannot involve an absolute absence of presuppositions, but rather a critical awareness and analysis of the researchers own. The epoch is the process of freeing one self from prejudgements and preconceptions (Marshall and Rossman 1999 p113). Phenomenological reduction leads on from this, where the focus of the research is set in brackets and everything else is set aside so that the entire research process is rooted solely on the topic and issue. Within the brackets, the phenomenon is perceived and described in its totality. Moustakas (1994 pp95-6) uses the term horizons and horizontalisation to ensure that every statement to the issue is treated as having value.

Phenomenological reduction is aimed at explicating the essential nature of the phenomenon. This is a process whereby the phenomena becomes differentiated and is thus comprehended. The process of phenomenological reduction is a way of listening with a conscious and deliberate intention of opening ourselves to the phenomena. Finally, there is the role of imaginative variation and synthesis. The former intends to seek possible meanings through the utilisation of imagination, varying the frames of reference and generally approaching the phenomenon from divergent perspectives. The aim is to arrive at a structural description of an experience. Imaginative variation should enable the researcher to derive key structural themes from textual descriptions.

Uncovering of the essences or 'invariant meanings' (Giorgi 1994, p214), is central to the imaginative variation process, which should lead to the final stage of the research process, which is a synthesis of the structural descriptions into a unified whole. The essence is that which is common or universal. In terms of this research, what is needed is a synthesis of the meanings and essences of the experiences of managers, as it relates to strategic marketing planning.

### **3.6. THE PHENOMENOLOGICAL INTERVIEW**

Burgess (1984 p102) indicates that in the social sciences there is a long tradition where the open ended interview has been perceived as a conversation with a purpose and hence used extensively. Holstein and Gubrium (1997), state that it is the most widely applied technique for conducting systematic social inquiry. The long interview is a conversation to be analysed and is about gaining access to diverse organisational settings, cultures and knowledge. The interview can be seen as being commonplace and a naturally occurring occasion, used when experience can be articulated (Holstein and Gubrium 1997). Without much doubt, interviews are important windows on the world. Holstein and Gubrium (1997) also argue that we live in an interview society, where the mass media, human service providers and researchers increasingly generate information by interviewing. As Miller and Glassner (1997) point out, information about social worlds is achievable through the process of in depth interviewing, as the latter is meaningful beyond the context in which it occurs. Within the interview, it should be possible to experience the social and organisational worlds of respondents. This makes possible a description and explanation of lived experiences and perceptions within an organisation.

Moustakas (1994 p114) in discussing methods of data collection indicates that,

"Typically in the phenomenological investigation the long interview is the method through which data is collected on the topic and question. "

With this in mind, it is important to consider the nature of the phenomenological interview process, as this is the research method employed by this study. The topic of the phenomenological interview is the lived world of the subjects and their relation

to it. The purpose of the interview is to describe and understand the central themes that those being researched experience (Kvale 1996, pp52-55). Gabriel (1998), argues that storytelling goes on almost ceaselessly. Through the phenomenological interview it is expected that managers will transform their experiences into stories about marketing and the management of it. Importantly, it has to be recognised that the interview is an interaction between two people and the interviewer has to be very conscious of the interpersonal dynamics that take place. The interview may be anxiety provoking and hence evoke defence mechanisms in respondents. The interviewer must be aware that they are the research instrument. This means knowledge is largely acquired through a process of social interaction, dependent on how interviewee and interviewer respond to each other in a subjective context.

The intention of the interview is to be theme orientated, where two people talk together about a theme or particular themes that are of mutual interest. The aim is to focus on certain key issues, which the interviewer leads the subject towards. The interview is not strictly structured as in a quantitative study, but it is certainly not non directive either (Kvale 1996 p196). The result is analysed with respect to the life world described by the person. The phenomenological interview seeks then, to describe and understand the meanings of central themes in the life world of the subject as pointed out by Giorgi (1994). The focus of the research interview is on descriptions that depict the varieties and differences of a particular phenomenon rather than arriving at fixed categorisations (Giorgi 1992). The latter goes on to say that,

"...we could say that description is the clarification of the meaning of the objects of experience precisely as experienced." (Giorgi 1992 p122)

What should be obtained are concrete descriptions of those situations and actions as to how the phenomenon is experienced. From this, the interviewer should be able to arrive at meanings. In accordance with the phenomenological reduction (Hycner 1985), the interviewer must attempt to gather descriptions of the relevant themes of the interviewees life world that are as free of suppositions as possible. Rather than having ready made categories for analysis, a deliberate openness should be fostered facilitating receptivity to new phenomena. The point can be made that presuppositionlessness implies a critical consciousness of the researchers own presuppositions, suggesting that it is intensely difficult to separate these two factors

entirely. Linked to the need for setting aside preconceptions, is the ability of the interviewer to be sensitive and knowledgeable about the topic being researched.

Clearly, a subjects statements are sometimes ambiguous. The interviewee may give what are apparently contradictory statements during the interview. Possibly these may not just be the result of failures in communication during the interview, but may reflect real inconsistencies and ambivalences, which exist in the mind of the interviewee or in the objective external world. As the aim of the interview is not to end up with unequivocal and quantifiable meanings, then these possible contradictions must be described (Kvale 1996 p34). On a related point, respondent's perceptions of a theme may change during the course of an interview. They may discover new aspects of a theme, or they may feel differently about a topic after the interview is complete.

### **3.7. QUALITATIVE DATA ANALYSIS AND GROUNDED THEORY: A PHENOMENOLOGICAL VIEW**

So far, the analysis of data drawn from qualitative research has not yet been considered in any detail. It is a very important aspect of any study (Miles and Huberman 1994 pp10-12). In what appears to be the major way in which qualitative research analysis is undertaken Burgess (1984 p174) indicates that categories must be established which capture the subtleties of the data. Strauss and Corbin (1990 pp57-194), working within the grounded theory perspective, describe a category as a tool to classify concepts which are based in the data. A segment of data must be selected and then assigned to an analytical category. In grounded theory, the process of open coding is concerned with the early fracturing of data so that significant aspects of the research are labelled, sensitising the researcher to patterns that are occurring. These interesting ideas in the research are catalogued and can be built into theoretical memos as Haslam (1997) points out. This represents the writing up of ideas which are present in the open codes.

Theoretical memos are means to abstraction and conceptualisation, which when sorted and compared with existing and further data, leads to the development of selective codes and then core categories. These two processes represent stages in the refining of analysis. Core categories are the central phenomenon around which the final theory



is built (Haslam 1997). The process of coding results in increasingly sophisticated analytical categories which must be conceptually and empirically grounded in the research. In grounded theory, the notion of categories, meaning analytical constructs facilitating the process of theory building, are used extensively. These categories must be capable of delivering theory and should not just exist in their own right as descriptive labels. The research must not just be a question of empathising with respondents experiences.

A key issue for the researcher is the attempt to find indicators for analytical concepts in the data. For Haslam (1997), this process requires theoretical sensitivity. Connections between categories must be seen and it must be understood how they all fit together and make up the main 'story line'. Hargreaves (1967, pp182-192), suggests that what the researcher can do is to draw out theoretical models from the data collected. For example, decision making procedures in an organisation can be compared with an ideal type and from this, analytical categories can be developed. Themes which emerge and reemerge from the data collection process previously executed, can become the basis of the creation of analytical categories. It is interesting here to note Bryman. He points out that in spite of the large number of times grounded theory is cited in the literature, there actually exist few examples of its application in terms of the formal procedures dealt with above.

"The term is often used as a way of conveying the notion of an approach to the generation of theory which is derived from a predominantly qualitative research base." (Bryman 1988 p85)

Whilst the general inductive approach of grounded theory is regarded as important and influential in this study, it is necessary to deal with some key differences here between it and the phenomenological method. With this in mind and in order to grasp more fully the distinct contribution of the phenomenological method to research and in particular to the concerns of this study, the following argument is important. In terms of raising issues about the dominant form of understanding in qualitative research, it can be argued that the coding, categorisation and counting of data in grounded theory analysis, and some forms of ethnography, represents the problem of a mixed discourse (Giorgi 1994). This is the combining of different criteria and practices, where measurement is employed in the service of qualitative data (Miles and Huberman 1994 pp252-4).

Categorisation of the content of qualitative data can have the effect of atomising meanings as facts. Meaning atomisation results in the meaning of an act becoming objectified into a finished thing - a datum. The practice of formalising and quantifying data results in the reduction of the subjective dimension of understanding, see Kvale (1976). It can be argued that meanings do not have to be counted in order to understand why a particular practice has occurred. It can be postulated that a phenomenon is present when its meaning is expressed by the subject. The fact that this meaning is frequently present in the words of the subject, may or may not have further implications, depending on the approach adopted by the researcher. Giorgi (1994), makes the point that Miles and Huberman advocate formal analytical procedures as they reflect the approach of mainstream science and are seen as a safeguard for objectivity. These categories become easy to identify across researchers and they are more manageable than larger and more dense descriptions. The key question here is whether or not the process of categorisation will really preserve aspects of the raw data that are vital to an understanding of the phenomenon being investigated. The counting of meanings perhaps relates more to the issue of familiar scientific procedure, than to intrinsic questions of whether or not what is being asked is a truly quantitative question.

"The received wisdom seems to be that one has to submit raw data to all sorts of formal procedures in order to make them valid and reliable." (Giorgi 1994 p195).

Additionally, the emphasis on coding that occurs in grounded theory can lead to the analyses of isolated variables, abstracted from their context in live interpersonal interactions. Here a key issue is that the sense of the wholeness of, for example, an interview situation can be lost. Grounded theory suffers from the problem of counting and displaying meanings and what results, is that the technical nature of coding can ignore the contextual basis of interview statements in the narratives of lived and whole conversations. Importantly for Giorgi (1994), the process of categorisation does not preserve those aspects of the raw data that are essential to an understanding of the phenomenon. It must be stressed that social phenomenon is particular and ambiguous. In addition, it is less replicable and less clearly defined through counting, than has been suggested by its advocates as Giorgi (1994) indicates.

The problems inherent in counting can be illustrated by using content analysis as an example. When examining documents, *a specialised analytical approach can be used*, known as content analysis, see for example Silverman (1993 p59). The raw material for content analysis can take any form, for example textbooks, newspapers and articles. In the context of marketing, de Chernatony and Dall' Olmo Riley (1998), content analysed over one hundred articles to determine the range of definitions of the word 'brand'. They came up with twelve categories, which were later used in interviews with marketing managers. This is in line with the approach of content analysis, where it has been viewed as an objective way of obtaining a quantitative description of various forms of communication, see Rossman and Marshall (1999 p113). The latter indicate that as content analysis has evolved, it has been viewed more openly as a method for describing and interpreting symbols. As with grounded theory, however, the usual approach is for the raw data to be submitted to very formal procedures to make them valid and reliable according to the canons of a traditional scientific approach, see Kolbe and Burnett (1991); Kassarian (1977). The emphasis is on measurement and the reduction of potentially rich themes to codes and categories. This is an issue that emerges with the approach of grounded theory and also to the interviews conducted by de Chernatony and Dall'Olmo Riley (1998). In the case of the latter, potentially complex discursive themes were reduced to simple categories for analytical purposes.

In contrast a phenomenological approach tries to concentrate on a holistic approach to analysis. It does not use coding directly but relies instead on a series of deeply understood summaries (Miles and Huberman 1994 pp86-87). Phenomenological analysis concerns itself with meanings and not with frequencies, as is the case with content analysis and other forms of qualitative research. It is not necessary to count meanings in order to understand why certain practices occur and the point is that by doing the former, the essence of the experience can be lost. Through continued readings of the source material and through vigilance over presuppositions, one can reach the essence of the account of a life experience. This method does not lead to covering laws, but to a practical understanding of meanings and actions.

### **3.8. METAPHORS AND MARKETING**

Whilst the general approach of phenomenology can provide insights into the life worlds of participants in a research study, what is also needed are theoretical devices which will enable the researcher to develop a structured analysis of individual interpretations of reality (Prange 1999). To facilitate this process, an important resource that will be utilised in the subsequent analysis chapters is the socially constructed metaphor. Here, in the closing sections of this chapter, we will examine the value and contribution of metaphors in research as they provide substantial potential for theory development in an interpretative investigation Clegg and Grey (1996); Prange (1999).

In broad terms, a metaphor is a statement maintaining that two phenomenon have certain common properties. Stern (1988), points out that metaphors are a specialised use of connotative figurative language, involving a comparison, in which an analogy is used to make a statement and to hence convey an idea. In a metaphor one thing is said to be another, which is literally impossible, but which is imaginatively suggestive. Stern (1988), argues that the latter is expressed by the syntactic pattern *x is y*. On closer scrutiny, it is clear that metaphors permeate all aspects of life. In social science writing for example, they are clearly apparent when we realise that terms like 'theory building' are widely used.

Metaphors get deployed in other ways as well. Stern (1988) highlights the fact that the business community regularly creates metaphors to describe events and processes. Corporate takeovers are explained not only in allegorical terms, but in medieval ones as well. 'White knights' battle 'hostile raiders' for control of an organisation. For Tsoukas (1991), metaphors involve the transfer of information from what he calls a relatively familiar source domain to a new and relatively unknown target domain. The argument is that people can only understand abstract notions by mapping them on to more concrete ones, which goes some way in supporting the proposition made by Tsoukas. Importantly, as Morgan (1986 p12) has noted, metaphors frame our terms of understanding in distinctive ways. Their usage implies a way of seeing and a way of thinking about the world.

Metaphors are both descriptive and generative. They can name a situation and

perhaps more importantly they can frame it and set the problem to be explored. Language is extremely important here, because the way individuals talk about the world has a great deal to do with the way in which the world is understood and acted upon (Dunford and Palmer 1996). Metaphors matter, because they can profoundly affect action. A key question to ask here is what are the metaphors that marketing managers work with and how do they influence subsequent and on going practice? Metaphors can provide a central role in defining action as necessary and correct for managers in a given context (Chia 1996). Metaphors are used to convey meanings. A good example of this is Morgan (1986 pp19-319), who presents his analysis of organisations in terms of a wide variety of different types of metaphor. The organisation is presented in metaphorical terms as a machine, as an organism, as a brain, as a culture, and as a political system, as a psychic cave, as flux and transformation and finally as an instrument of domination. What the metaphor achieves is to show the importance of language in organisation settings and to see the same situation from multiple perspectives. In terms of the management of change, Morgan (1986 pp321-43), argues that people tend to act and think according to implicit metaphors and to become trapped by those images. He goes on to point out that it is necessary to highlight the metaphor in question, and to indicate its strengths and weaknesses and to show how alternative metaphors provide complimentary views of reality.

In marketing, there is no doubt that metaphors are used extensively. Indeed at the very heart of marketing lies a key metaphor, the marketing mix, where practitioners as Brown (1995a, p20) points out, are expected to act as if they are preparing a meal from a mix of ingredients. Brown (1994), has used metaphor in his own writing, when he made a post modern attempt to meld marketing with cinema. A substantial amount of marketing language is actually metaphorical in nature, as O'Malley and Tynan (1999) indicate. It is argued that products experience changing types of growth and this is captured in the notion of a product life cycle. Customers too can also be represented metaphorically, as 'segments'. Brown and Turley (1997), see the marketer as a tourist, albeit in postmodern form. O'Malley and Tynan (1999, p592), also draw our attention to the relationship metaphor which is widely used in marketing. For them, the relationship metaphor has,

" ...allowed us to appropriate the values of interpersonal relationships and to

borrow their theoretical and conceptual frameworks in order to understand commercial exchange."

Hunt and Menon (1995), carried out an extensive review of metaphor usage in the context of competitive strategy. They identify among other things, marketing strategy as warfare, as marriage and as a game. Tynan (1997), also offers us a review of one of these areas, where the marriage analogy is used by marketing authors. In this case, marketers are asked to treat long standing relationships with key customers as a 'marriage'. Tynan (1997), points out that whilst some marriages and view of marriage see them as being freely entered into and likely to last a lifetime, this particular metaphor is problematic when transferred to the target domain, because relations between the sexes can also be based on factors like stalking and rape. For Tynan (1997), the marriage analogy has outlived its usefulness and is detrimental to the conceptualisation of the relationship marketing paradigm.

More fundamentally, Arndt (1985) points out that metaphors are the basis of many of our paradigmatic perspectives in marketing. For Arndt (1985), large parts of human behaviour can be interpreted as attempts to make sense of the world by developing concepts about the environment. Meaning is thus provided to us through language, art, symbols and myths via subjective processes. Words and names become tools for comprehending what is out in the world to be shared with others. Metaphors for Arndt (1985), help researchers to view the world through concepts, language and images, which focus and filter that which is being studied. Arndt (1985), gives examples of important metaphors in a range of paradigm groups which include the 'victimised consumer' and 'spaceship earth'. The former draws our attention to disadvantaged consumer groups and the latter emphasises the environmental responsibilities of marketing.

For Zaltman (1996), metaphors are seen as central to cognition, where one thing is represented in terms of another. Metaphors are a way of creating and shaping thought. He advocates research into consumer behaviour using the Zaltman Metaphor Elicitation Technique (Zaltman (1996). This approach enables close attention to be paid to the metaphors customers use. This means that the researcher can learn more about consumers thoughts and feelings, important information that can be used for product strategy development in marketing. Also, within the context of the marketing

organisation, McWilliams and Dumas (1997), advocate the use of metaphors in brand development. Here, cross functional teams can be brought together and asked to construct metaphors which they believe typify the essence of the brand, an essence which can then be communicated to customers. For McWilliams and Dumas (1997), metaphors become brand tools which add value.

### **3.9. METAPHORS META THEORY AND MARKETING**

A reason why metaphors are seen as particularly relevant to this interpretivist study resides in the nature of current marketing theory. If we consider the nature of this theory, then it becomes clearer as to why the use of metaphors can appear to be liberating. It has been argued in this study that in terms of the current dominant paradigm, a meta theoretical position is adopted, positing an objective world that is amenable to conventional marketing planning and strategy techniques, about which valid judgements can be made (Anderson 1983). Within this perspective, the marketing planner and the researcher have the task of developing knowledge which represents this external world through a range of rational tools and systems. In philosophy of science this is articulated as a realist ontology and a positivist epistemology. In this framework, it is assumed that marketing relations have a systemic character, a concrete and real existence independent of the observer. What this allegedly produces is regularities in marketing behaviour (Arndt 1985). As a consequence, the knowledge of marketing planning that we hold is bounded, capable of being itemised and operationalised according to definite and discoverable principles.

The notion of a marketing meta-theory evokes a situation where a normative prescriptive approach is advocated. This is evident in the way in which marketing planning theory is presented, where knowledge is managed as sequence of planning processes that are embodied in a range of strategic tools. There is one unifying theory of marketing and one unifying theory of marketing planning as Kotler (2000 pp8-16) points out. The world is viewed through the functionalist paradigm, with its constituent parts as clock work like mechanisms all working together under a range of immutable laws (Arndt 1985). In this sense, marketing planning and strategy development is about understanding how the marketing world works and then finding the one right way to cope with any marketing problems. The right methodology is largely about

establishing connections between parts of a system, the assumption being that marketing planning issues are hidden and exist independently of human thought.

Though metaphors are very evident in much current marketing thinking, they are representative of this meta-theoretical orientation. Most of the marketing metaphors that are in widespread use by theorists, are suggestive of overarching systemic qualities. These metaphors are driven by deductive logic, being concerned with prescription and not with an understanding of individual conceptions of marketing. The notion of a product life cycle, a wheel of retailing, a channel of distribution, a marketing mix, can all be judged as being representative of objective marketing laws. These it is suggested, are not metaphors which are rooted within the practices of most marketing managers, but within prescriptive theory. The latter effectively removes individual agency from any accounts of reality. The consequences are that the provision and dissemination of practical knowledge about marketing decision making is being seriously neglected, as O'Driscoll and Murray (1998) point out. What this research aims to show is that metaphors are deeply, widely and differently embedded in marketing managers perceptions. It is argued that these metaphors are not of the dominant meta-variety. Instead, it is postulated that the metaphors in use reflect the pluralistic character of reality, expressed through human mental activity as symbols and language (Moustakas 1994 p25-28).

A central argument here is that metaphors can be a useful research tool if they emanate from an epistemological position which points out that meanings are not given, but constructed by participants as they go about their everyday organisational activities (Prange 1999). The problem is that for much current marketing theory, the metaphors are in fact given. A focus instead on the metaphors actually used by organisational members, can give the researcher insights into what previously might have been hidden feelings and perceptions about marketing planning activity. Importantly, metaphors can reveal thoughts that are difficult to articulate (Cazal and Inns 1998). These perhaps are intuitive, emergent practices and understandings, relating to the use of tacit knowledge in organisations (Baumard 1999 pp197-223; Hackley 1999). Broekstra (1996 p64) points out that,

"...tacit knowledge includes subjective insights, intuition, experience, emotions and the use of metaphors."



In drawing attention to the importance of having alternative conceptions of reality, the socially constructed metaphor can be used to highlight the limits of traditional prescriptive theory and not to support it, as current mainstream marketing metaphors appear to do.

### **3.10. METAPHORS AND RESEARCH**

Clegg and Grey (1996) defend the use of social constructionist metaphors in research. They reject the notion of an objective social reality and argue for an interpreted order in data. A key researcher who used metaphor from a phenomenological perspective is Goffman (1959 pp28-82). His first research strategy was to use extended metaphors, normally those of life as theatre and as a game. He did not see metaphors as just appendages to research studies, but as a particular form of map to the social world. Thus the ordinary seeming organisation of corporate offices can be reconsidered as carefully constructed 'front' and 'backstages' (Manning 1992 pp98-99). Goffman used metaphors as conceptual tools, exploiting our ability to extend their use to a range of settings. His metaphor 'life is a confidence trick' was shown to apply on all manner of occasions. For Goffman the dramaturgical metaphor is strong. We play roles, tell stories, mystify performances and take part in impression management. This is an important dimension of marketing planning management which much current theory fails to articulate.

What metaphors also enable us to do is to develop a view of reality which takes full account of social structure, yet can still be based within the phenomenological perspective. In the study of organisations, marketing and society, researchers have to contend not only with individual perceptions of reality, but with objective institutions and structures, which people reproduce and transform (Berger and Luckman 1966 pp33-61). There is, as Giddens (1984 pp281-88) points out, a dualistic relationship between agency and structure. There is no independently existing pure objective or pure subjective world, as this denies the relationship between the outer environment and the personal self (Inns and Jones 1996). For Berger and Luckman (1966 pp56-60), there takes place a subjective interpretation of the social stock of knowledge. Metaphors as language phenomenon are a very important part of this stock of

knowledge. Metaphors become then, a point of contact between socially defined meanings and individually created meanings. They show how people use,

"...relatively stable collective forms for the making and expressing of diverse and possibly idiosyncratic and private meanings." (Rapport 1994 p24).

As Inns and Jones (1996) indicate, the metaphor becomes central to showing how individuals ascribe meaning in the world, by working on the basis of similarities. The phenomenological socially constructed metaphor overcomes the problem often laid before interpretivism, for example by Clegg and Dunkerley (1980 p288), that it cannot adequately take account of social structure. In the context of this agency structure debate, the metaphor can direct our attention to the interaction that occurs between an individuals conceptual framework and the external world of physical things and social structures. Clearly, marketing managers will ascribe meanings through metaphors. The task of the researcher then becomes one of determining how collectively understood terms relate to the specific situation of individual managers.

Commonly understood terms used by marketing managers could include descriptions of companies as 'rudderless ships', management practice as 'more black art than science' and research into the market as 'keeping our fingers on the pulse'. Whilst we recognise these metaphors, only in depth research will reveal to what extent they are embedded in local meaning and action. For Miles and Huberman (1994 pp250-2), the metaphor should not simply describe or denote a phenomenon but facilitate the movement up to a more analytical level. As Hampden Turner's (1994 pp26-28) research reveals, metaphors can unravel, in an analytical fashion, the mental charts used by organisational members in the creation and management of meaning. Furthermore, if several metaphors are in use in a research study, then this should not be seen as a problem. Inns and Jones (1996), point out that partiality is advantageous, as having a variety of metaphorical perspectives avoids the problem of reductionist understandings, enabling the researcher to build up a complete picture of the complexity of a situation.

In a given context, metaphors can be seen as being useful in terms of analysing and imposing structure on research material, see Cazal and Inns (1998); Tsoukas (1991); Kvale (1996 pp274-5). The latter points out that the main aspects of a study

may be more easily understood and remembered when it is worked up into clear metaphors. Miles and Huberman (1994 pp250-2) strongly recommend the use of metaphors in qualitative studies, suggesting that firstly, they can be used as data reducing devices, where several instances can be taken and one generality made of them. The metaphor becomes then a powerful tool for the creation of themes and can be used compactly to convey many connotations and ideas. Additionally, Miles and Huberman indicate that metaphors are excellent decentering devices. The researcher has to step back to see beyond the existing conceptual models in order to ask what is really going on in a particular context. In the coming chapters, the metaphor will be used as an analytical tool of research, to meet the criteria which have been discussed in these sections and the next.

### **3.11. METAPHORS AND THEORY GENERATION: A PHENOMENOLOGICAL PERSPECTIVE**

In any research study, theory explication has an important role to play. As Miles and Huberman (1994 p90) point out, the researcher wants "...to understand and to explain coherently why things occur as they do." A key question to ask here is what actually makes a good theory and how metaphors can contribute to this process. Webb (1961) suggests that good theories exhibit knowledge, scepticism and generalisability. Metaphors, if based within an interpretivist framework, rate highly on the first criteria, because they are saturated by closeness to participants. With regard to scepticism, or what Webb (1961) calls dissatisfaction, this is always likely to be the case with qualitative studies. Different social contexts and meanings will result in different types of findings, given the same research topic.

It can be argued that in all three areas traditional marketing theory does not meet Webb's criteria. It fails to obtain all possible knowledge about individual circumstances, instead preferring to lay down prescriptive guidelines as to how organisational members should implement marketing. Certainly, little scepticism seems to exist regarding its purported effectiveness. Additionally, it is commonly regarded as being generalisable, despite the fact that marketing is different in one context to another. Even those committed to the traditional prescriptive school of marketing are recognising this important point, see Simkin (2000). Despite this, a great deal of

research into marketing planning is carried out and evaluated according to the way in which it is supposed to conform to an objective external reality. The work of Greenley and Bayus (1993) is a case in point. There is an overriding concern with generalisability, where the latter becomes the only way to label something as meaningful theory (Weick 1989).

For Miner (1984), any failure to generate generalisability, or any theory which is non cumulative in nature, is seen as threatening and hence not useful. If it is not generalisable, then it is not valid. Interpretivist approaches to theory development question this perspective, as social situations and actions are contingently located. It is by no means clear that findings obtained in one marketing situation are likely to be replicated in others (Kent 1986;1998). For Prange (1999), we need to broaden our range of ontological and epistemological assumptions about what good theory is. It is too easily assumed that the theory which surrounds the dominant view of marketing planning is 'good.' For Weick (1989 p517) good theory is,

"...a plausible theory...interesting rather than obvious, irrelevant or absurd, obvious in novel ways, a source of unexpected connections, high in narrative rationality, aesthetically pleasing or correspondent with known realities."

Interpretivist based metaphors as theory meet the presumed realities of practitioners and are plausible because they represent the meanings actors use and work with. Metaphors can be high in narrative rationality because they seek to explain action and meaning in detail. Metaphors may represent unexpected connections and this might appear in an aesthetically pleasing way, dependent of course on audience perception. The theory put forward based on an organising metaphor may well be novel, in that it will reflect the nature of marketing reality, unburdened by a need to conform to traditional thinking. In contrast, it can be argued that conventional marketing planning theory struggles on all of Weick's criteria. Metaphors can make other important contributions as well. Astley (1984), points out that in a business setting, managers need to interpret the significance of their own actions as well as those of others. It can be argued that metaphors can help to achieve this. The everyday thinking of managers can be utilised in the construction of theory, through metaphors, rather than in the prescriptive tenets of conventional marketing science. Alternatively then, it can be argued that the practitioner could become the final arbiter of the degree to which a theories value is authoritative.

Theories guide managers thinking. They can tell them what to expect, where to look, what to ignore, what actions are feasible and what values to hold (Prange 1999). Additionally, the latter also points out that metaphors can act as lenses, enabling researchers to see reality more clearly. Theories can influence retrospective interpretations; conventional marketing planning theory depicts what the practitioner should have done in any given situation. Marketing planning's meta-theoretical approach also tells the practitioner how to act in the here and now. Alternatively, it is argued that metaphor inspired theory should be used, based on a phenomenological perspective, enabling the researcher to better understand the meanings and actions of individual marketing managers.

Brief and Dukerich (1991 p341), adopt the notion of practicality in theory development. They suggest that theory should act as an "idea generator" making it possible for practitioners to view their worlds in ways they might not have done previously. Practicality is not about offering narrow 'useful' prescriptions as is the case with traditional marketing theory. For Brief and Dukerich (1991), the traditional approach to notions of usefulness in theory development has almost always been equated with the ability to explicate how something or some problem, can be solved in an applied setting. In contrast, a practical theory is still useful, but more widely so. It can suggest course of action, but is not an advocate of any one approach. Metaphors as theory can guide analysis, and explore solutions, making use of a variety of perspectives (Inns and Jones 1996). Metaphors can act as symbolic devices, where meaning can be constantly derived from practical experience.

To further our understanding of marketing practice, we need to move beyond the prescriptive stance of conventional marketing meta-theory. As Whetton (1989) points out, there is a case in theory development to distinguish between description and prescription. By describing at a deep level what key metaphors marketing managers think and work with, we may develop new knowledge, where insights can be communicated to others. In chapters five to seven a range of metaphors are used to structure the research material, metaphors which are used by the managers in this study. In the final chapter, these same metaphors are used as theoretical devices, in order to produce a series of new speculations about marketing planning. What this culminates in is the recommendation for a new approach to marketing planning, based

on the idea of a 'strategic marketing signpost'.

Supported by Inns and Jones (1996), a central point here is that there exists a strong case for more phenomenologically based research programmes into marketing management. This should enable us to open up the life worlds of marketing managers in a way that in the past has never really been satisfactorily accomplished. In this study, managers do open up their life worlds through not only the use of metaphors, but through stories as well. Stories represent powerful tools in organisational analysis (see Sims 1999; Gold 1997; Morgan and Dennehy 1997). The narrative style that is adopted by the managers in this study in talking about their lifeworlds, has important implications for the structuring of marketing plans. With this issue in mind, the next chapter shifts to a detailed explanation of the specific research methodology adopted in this study. Following on from this, in the same chapter, there is a brief overview of the main research findings.

## **CHAPTER FOUR**

### **THE RESEARCH METHODOLOGY**

#### **4.1. THE RESEARCH ISSUES: A REVIEW**

At this juncture it is useful to review the key issues which have been instrumental in directing this research, before examining in more detail the methodology adopted. One aim here is to examine the applicability to business organisations of the conventional model of the strategic marketing planning process. In much of the literature, for example Brooksbank (1996), the conventional model of the strategic marketing planning process and the resultant plan is standardised, and considered applicable to all possible types of business organisation in all types of situations. Marketing planning is conceptualised within a universally relevant framework. Most modernist marketing theory is structured around the logic of this model, see Robson and Rowe (1997); Brownlie and Saren (1992). This perspective suggests that all the researcher needs to do is uncover unproblematic general laws and then generalisations of a prescriptive nature, can be made about marketing planning activity in organisations. We can ask if in fact this does correspond with the reality of marketing practice in organisations.

Furthermore, the intention of this study is to attempt to uncover the alternative processes that might be involved in making marketing decisions, in much the way suggested by Kent (1986). The traditional rational stages, step by step model of the strategic marketing planning process has had a significant impact on our view of the role of a marketing manager and the way he or she goes about conducting their activities. Are organisational events rationally planned like this however, with full information to hand? The case may be that for many organisations decisions are made incrementally, often intuitively, with perhaps limited knowledge of the wider business environment Daft and Weick (1984); Smircich and Stubbart (1985). It is argued that there exists an alternative to the current dominant prescriptive and rationalistic marketing paradigm. In contrast, a phenomenological perspective indicates there are multiple realities associated with our definitions of marketing (Kent 1986;1998). Using this approach, what should be taken for study are the subjective and context dependent interpretations of individuals in organisations, as they go about their business.

The implication here is that businesses are resistant to the generalisations of the systemic model of marketing planning which is currently held over the heads of organisational members. To some extent, this research can be seen as being an



attempt to search for the rational marketing model in organisations, in much the same way that Watson (1994 pp9-28), searched for the rational analytical model of management in his study of human resource managers in 'ZTC Ryland'. Marketing planning outcomes and marketing decision making might well be seen to be operating within a far more localised and contingent context than much of the current thinking suggests. The truth is, that marketing decision making and its outcomes may well not look much like the model offered in the literature. Clearly, the ramifications of this are significant.

The contention argued here is that all organisations are unavoidably local and particular phenomenon; an issue understated or ignored in much of the mainstream literature on business planning (Boden 1994 pp179-198). The definition of marketing held by organisational members responsible for its implementation, is likely to have a considerable impact on the practice of marketing, see Kent (1986; 1998) and Robson and Rowe (1997). This means that there may well be other realities associated with the term 'marketing' which are unconstrained by any adherence to the modernist paradigm. The implication is that we may need to think again about the nature of what is meant by current marketing theory. We may also have to rethink the structure and implementation of the strategic marketing planning process, in terms of education and training, a point made by Lancaster and Waddelow (1998).

In addition, the cultural disposition and values of organisational members are seen by an increasing number of writers as being very significant in contributing to the effectiveness of the marketing planning process and to the execution of the plan, see for example Piercy and Morgan (1994). How culture is managed and what the role of internal marketing is perceived to be in this process, will also be of interest in this study. McDonald (1989), has noted that the values held by organisational members can either impede or advance the general marketing effort and Piercy (1997 p436), believes marketing planning has to be managed in the context of three dimensions. One dimension is analytical, concerned with the traditional models and techniques of rational planning, while the other two dimensions are about managing organisational behaviour and the structures of the firm.

It may be the case that in a number of the organisations which are being studied here, different interpretations of marketing are likely to lead to different strategies and tactics being employed to those advocated in the mainstream literature. These

alternative perspectives can only be uncovered by delving into the meanings organisational members attach to the words strategy and marketing. The latter might be anything from seeing it as selling, or as primarily being about public relations (Robson and Rowe 1997). The whole area of what strategy is and means in practice, can be contested (Burgelman 1983). For example, in some contexts marketing might be seen to be primarily about relationships in a network (Gummesson 1999 p2), particularly with the increased emphasis being placed on supply chain management, see Christopher (1997 p18;1998 pp213-49).

## **4.2. PLANNING THE RESEARCH: THINKING ABOUT ACCESS**

The open ended, unstructured phenomenological interview (Moustakas (1994 p114), was the planned primary source of data, in gathering information about the marketing planning process in organisations. The intention was set to interview senior managers who could talk for the marketing process in their organisations, managers who are involved in deciding strategy, strategy processes, and marketing operations. As Hycner (1985) argues, the in depth interview is a satisfactory method of illuminating the perceptions of people. This approach can also be considered a less threatening method of inquiry than some other more intrusive qualitative methodologies, like conversation analysis. Managers may be very reluctant to grant access for conversation analysis, where the researcher has to attend meetings when sensitive issues will be discussed. It became apparent in the period of organisation leading up to the interviews for the research, that virtually all the managers appeared to have very extensive and busy schedules. This probably precluded them from being able to organise any other forms of research in their organisation, apart from interviews, even if this had been seen as a priority by the researcher. If funding had been offered to the various managers, then the situation might possibly have been different.

Prior to commencing any research, the suggestion made by Jankowicz (1995 p80), that a project diary be kept was taken up. In this case, the diary was entitled 'Marketing Planning Research File' and was very useful regarding what it stored and recorded. It contained lists of all companies and individual names who could be potentially contacted, with separate sections for those agreeable or not, to the research. The file had dates and times of interviews along with copies of all correspondence. Very brief notes were included from time to time, before

transcription, of key outcomes of interviews. This helped to establish some key patterns and research directions. The file was taken to interviews, because it also contained some technical notes on marketing planning which might have needed to be referred to, for explanation or elaboration. In practice, these notes were rarely used. The file kept a running list of interviews completed and ideas on chapter structures for the thesis. In general, the file kept together in a convenient place, a range of issues pertinent to the research, which could be easily located.

In trying to deal with the issue of strategic marketing planning in business organisations, the first major hurdle that needs to be planned for and overcome, is one of access. Burgess (1984 p38) notes that this topic actually receives little attention in most methodology texts, although Hammersley and Atkinson (1995, pp54-79), devote a chapter to it and indicate that it is a problem which is particularly significant in qualitative inquiries. In a key comment on access in ethnographic case study type research, Silverman points out that,

" It is unlikely that these cases will have been selected on a random basis. More likely a case will be chosen because it allows access." (Silverman 1993 p160).

Stenhouse (1982), in discussing educational research, also highlights this issue of access and the need to take advantage of possibilities when they are presented. He points to the opportunistic nature of much research. It is "...a matter of seeing the interest offered by a school to which one can readily gain access." (Stenhouse 1982 p12). It did not seem unreasonable to think in the preliminary stages of this research, that for some organisations, the issue of marketing planning is very sensitive, and as consequence in many cases, access would be denied. Whilst it is not schools that are being studied, the situation here was seen as being broadly similar to the one mentioned above by Stenhouse, and as a consequence, it was felt important to take advantage of every research opportunity that was offered.

A point which must relate to confidentiality, is that at no time in any of the in depth interviews, was a marketing plan or any form of business plan made available which could be taken away and studied, although one company had one at hand and discussed its contents with the interviewer. This does suggest that when researchers talk about the issue of access, it is important to note that it actually comprises a number of levels. The investigator might be granted access for an interview, but not be allowed to examine documents. It must be added however, that the overwhelming

majority of managers who were interviewed, encouraged the researcher to return to the organisation, if it was found that any unresolved queries needed answering. Furthermore, it must be added here that the purpose of this inquiry was to gain respondents perceptions of sense objects (the marketing plans) rather than for the researcher to analyse the objects themselves, which is in line with the phenomenological approach (Moustakas 1994 p45).

#### **4.3. SELECTING RESEARCH PARTICIPANTS: MARKETING MANAGERS AND THEIR ORGANISATIONS**

The intention of this research project was to try and get access to a differentiated range of situations, in order to try and make sense of the perceptions of marketing managers approaches to marketing planning. In this respect, it was thought that there was no ideal number of companies to research, because it is suggested that each will have a unique approach to marketing and subsequently there is no master reality to uncover. In the conventional scientific approach, generalisability relates to the sample selected for research, in that it should be representative of the wider population (Bryman 1988 pp34-7). In contrast, the phenomenological researcher is seeking to illuminate particular human phenomena and not to necessarily generalise. Participants have to be sought out who can articulate their experiences and the phenomenon dictates the method. Other methods of sampling might in fact keep the researcher from fully investigating the phenomenon in the depth necessary, as numbers of respondents would have to be much higher.

Additionally, only a limited number of people can be interviewed in a phenomenological inquiry as a vast amount of data can emerge from even one interview (Hycner 1985). Phenomenological inquiry can be seen as being about uncovering diverse essences, from a subjects perspective, as well as looking for the possibility of more general patterns in the responses that these organisational members make, a point generally illustrated by Miles and Huberman (1994 p87). It would then be possible to say that for the organisations studied, a certain set of actions, conditions, perceptions and meanings apply that are principally emic in nature.

Bearing in mind the point that access in a qualitative study is "...time consuming and

difficult" Gill and Johnson (1997 p118), it was thought that considerable effort needed to be put into acquiring some useful background data, before any primary research was undertaken. This it was thought, would greatly facilitate access to companies, and so, for this research, the main initial route into the world of organisations was through obtaining and using five key lists, which identify, provide addresses and in some cases, outline types of companies in and around a major city in the eastern counties of England, which is where the research was conducted. These lists were the initial starting point and proved to be the only source of access into organisations.

Two lists constitute respectively the exporters and importers in the vicinity and is published by the areas Chamber of Commerce. The third list provides details of major employers within the main city in the area and is published by the Economic Development unit of the Council. List four comprises the names of top companies in the region, published by the Chamber of Commerce. Finally, the fifth list is of a number of companies which provide work placement experience for students in the Business Studies department of the local further and higher education college. These lists appear as a collectivity in the bibliography, under 'Newfound', the anonymous name given to the region where this study takes place. Altogether, the lists numbered several hundred organisations covering all major business sectors; professional services, large and smaller manufacturing organisations, retailers, leisure services, financial service providers and organisations within the public sector. The reason why such a large range of company contacts was established is related to the following point. If marketing planning is supposed to be a universally applicable phenomenon, as most of the prescriptive literature suggests, then it would be reasonable to expect to find it operating or to be known about, in all manner of business organisations; large, small, medium sized, those that are manufacturing based, and those that are in the service or public sector. Furthermore, it is important to see how diverse types of organisations approach the whole issue of marketing and decision making.

The lists of organisations were consulted extensively, in order to try and arrive at a balanced range of organisations who could be contacted, in the hope that they would be agreeable to the research, based on the above criteria. After considerable deliberation, the conclusion was drawn that twenty three companies would be a good number to research, as this would enable virtually all the different business sectors to be covered. In order to try and meet this requirement, eighty two organisations were

initially identified and approached. This proved to be a sufficient number, as the target of twenty three interviews was achieved.

At this point, the nature of the organisations in the sample will be outlined, to show how they are largely reflective of the criteria discussed above. The market planning manager of the local newspaper group was interviewed, the only person contacted who had this apparently very specialised title. The marketing managers of two building contractors were interviewed. Their companies are major competitors. One organisation is part of a larger group, the other being a local company. Both these organisations are widely known locally and manage much of the major building work in the city and county. A major publisher was contacted, access was agreed and questions were answered by the organisations marketing director. Two internationally known financial service providers also granted access to interviews, one an established market leader, the other a successful new entrant. In the case of the former, a divisional marketing director was interviewed and in the case of the latter, the groups marketing manager. With regard to the retailing sector, a sales and marketing director was interviewed, representing a local department store. Representing the high technology firms is firstly a company manufacturing advanced semi conductors, with highly specialised international markets and in this case, the organisations managing director was interviewed. The second company in this category is one producing computer based training systems for the educational market. In this company, the marketing director was interviewed.

Two professional service marketing managers were also interviewed, one a local firm of solicitors, the other a national one. This twinning of organisations, which occurs elsewhere in the sample, was intentional, as it enables useful industrial comparisons to be made. It was felt important to include leisure and the public sector, so the local councils Leisure and Community services director was interviewed, having overall responsibility for marketing. From the world of media, a local television companies promotions and marketing manager was interviewed. From consultancy, the managing director of a local marketing strategy and designs provider was interviewed. A local business information and training organisation was contacted, and the marketing manager agreed to research taking place.

In order to ensure that all the major varieties of markets were researched, it was decided that marketing managers in fast moving consumer goods had to be

interviewed. To achieve this end, the following were contacted and agreed to the research taking place. The marketing and sales director of a company manufacturing beauty products, the marketing director of an international paint brush company and finally the marketing manager of a major company involved in food processing. It is interesting to note that these three interviews were the most difficult to acquire, in terms of obtaining agreement from the sector of business concerned. We might speculate on the reasons for this, perhaps fear of revealing information about strategic secrets in a very competitive market, or perhaps a result of time and resource pressures. In relation to the latter, the interview with the marketing manager of the food processing company had to be rearranged more than once, due to the visits of major retail chain representatives to the factory site.

A number of other marketing managers from manufacturing organisations were also interviewed, ranging from a small company making handbags, to a manufacturer of electrical motors, part of a larger group, but having the facility to operate with great autonomy in local and international markets. Another manufacturing company that agreed to research access, is placed within the international meat slicing market, and one more manufactures packaging machinery. The final company in this area, is a local but internationally renowned family printing business. In all these companies, interviews were arranged with marketing managers and directors, or sales managers having responsibility for the marketing function.

One question to ask when selecting the target companies and individual managers, was to identify to what extent they actually carried out the planning of marketing themselves, as opposed to being a part of a subsidiary, or in some other way based at a distance from the area where plans are constructed. With the growth of mergers, joint ventures, multinationals and the global firm (Webster 1992), this could be seen as a problem, with research questions about marketing planning being directed at organisational members who have no control or influence over its processes or execution. In selecting organisations this was seen then as a key factor to take into account and for all firms in this study, with the exception of one, marketing planning is largely a local affair. All managers and directors interviewed are directly involved with the development and execution of business strategies, be it local, national, or international.

We have here small and large organisations, service providers and manufacturing

companies, consumer markets and business to business markets, also public and private sector organisations. There are tangible goods represented here, fast and slow moving, along with a range of services. Companies selected operate on the international scene, nationally, and locally. A number are independent organisations, some are part of larger groups. Most are successful. Arguably, these organisations are a microcosm of the business world and discussions of the research provides important insights into how marketing planning is managed, in these type of organisations, at the end of the twentieth century and at the beginning of the millennium.

At a later point in time, one additional interview was carried out. This was done in order to obtain some feedback from a manager on the recommended 'strategic marketing signpost' discussed in chapter nine. This interview was obtained with a organisation having charitable status, a type not featured so far, but which still had a marketing function. Whilst the manager interviewed did not write plans, she had responsibility for implementing them and therefore could comment in an authoritative fashion on the new proposed method. The interview was obtained after a fourth telephone call, when previous requests to similar types of organisation had been rejected.

#### **4.4. MAKING INITIAL CONTACT WITH ORGANISATIONAL MEMBERS**

Any interview based research has to face the problem of knowing who to contact. In the context of marketing, this could prove to be especially difficult, as a current trend is for this function to become increasingly diffused and integrated across the organisation (Pickton and Wright 1997 pp9-11). Although evidence from this study emerges of this change occurring, the process of establishing who was responsible for marketing did not prove to be as problematic as originally anticipated. Each of the eighty two organisations were individually initially contacted by telephone, in order to establish who had responsibility for marketing. A general question was put to whoever answered the telephone; "If I wanted to direct an inquiry about marketing to someone in your organisation, who should I write to?" It was anticipated that the gatekeeper at this particular point would be a busy receptionist, probably working in a general office and as such would not appreciate a long explanation regarding a research study and the need to contact a manager in their organisation. This direct approach proved to



be a largely effective one, as names of key individuals was relatively easy to obtain, although the process of making the telephone calls was time consuming.

For the vast majority of organisations, the naming of a key person was a quick and straight forward process. If it was pointed out that no one was responsible for marketing, then the name of a sales manager or director was requested. For some organisations however, the inquiry represented a difficulty, in that it was clear the respondent was unaware of who to contact, or even that a marketing or sales function existed. In these cases, speculative names were requested and put forward, in the hope that they would prove to be useful contacts. At this stage, a minority of organisations wished to know the purpose of the inquiry and who the researcher was, before providing any names. In these cases, it was explained that the researcher was involved in carrying out a project into marketing and hoped to get the cooperation of local firms in its completion. This was sufficient in all cases, to get the relevant contact name.

The thinking was that if a named person was written to, rather than the "marketing manager" then a positive response would likely to be more forthcoming, especially as the nature of this inquiry, being qualitative, required a high level of rapport to be established. The use of names early on could only help to enhance this process, showing that the researcher had gone to some trouble in finding out who to contact. Jankowicz (1995 p110), points out that the use of a name means that individuals contacted probably felt more fully charged to respond one way or another, thus speeding up the research process in an effective way. Thomas (1993b), in a useful article about interviewing important people in big companies, makes a key point. He indicates that adequate preparation is an essential ingredient to the kind of research which involves interviewing key personnel in an organisation. It is the process he terms "getting ready" (Thomas 1993b p83), which is the topic being discussed in this and the previous section.

#### **4.5. ASKING FOR RESEARCH ACCESS: THE STANDARD LETTER**

After obtaining the required names each person was written to, outlining the research project and its requirements, see appendix (1). A standard letter was sent to all organisations. Considerable thought was put into its composition. This reaped benefits,

because twenty three organisations responded positively to the request for interviews, in a study the nature of which could be regarded as being high risk, where nothing could be guaranteed in advance in terms of access. Prior to the interviews, no respondents were known personally to the researcher, so access was entirely dependent on telephone calls and letters. It was considered useful to use the researchers full-time employment role as a means of gaining access to a range of business organisations, indicating that as a lecturer in business studies, he and his educational establishment would become more responsive to the needs of local business, if the college could obtain a better idea of how the commercial world operated. Clearly, some respondents were willing to be involved in the research feeling that their contribution would have a positive impact on business education.

It was clearly stated in the letter that a research project was involved here, but it was left to the interview stage before stating that it was specifically related to a research degree. The reason for this was that some respondents might have felt wary about discussing what they thought might be simply academic marketing issues and rejected the request. Recent work by McKenzie et al., (2001), has noted the reluctance of practising marketing managers to acquaint themselves with purely academic research. It was hoped that principally, organisational members would be attracted to the main theme of the letter, and would relate to the issue of theory versus practice, a point which could be seen as constituting common ground for managers from a range of backgrounds. At the start of the interview, the reasons for the research project being carried out was elaborated verbally for the benefit of the interviewee. Whilst respondents were never asked why they agreed to participate in the research, the opportunity perhaps to be able to talk to someone outside their organisation, listening sympathetically, might also explain the good response rate. In this respect, the letter pointed out the open ended nature of the interview, which could be seen as being attractive to some respondents.

Rather than just to be seen as wanting to take information from the target organisations and not providing anything in return, in the letter and in the face to face interviews, it was suggested that involvement in the research process could be of benefit to the host organisation. As Jankowski (1995 p108) suggests, this can be a useful tactic to employ when attempting to gain access. It was indicated that feedback would be provided in terms of either a copy of the final project or a copy of an article constructed out of the research. This was taken favourably by some of the

respondents, particularly those interested in seeing how other organisations were dealing with the issues of the study. The letter also tried to make clear how much organisational time would be taken up by the research and the letter suggests that initially, less than one hours commitment was required.

One issue considered important to deal with in the letter was anonymity, as organisational members may have felt they were being faced with discussing confidential financial and strategic information. For Kvale (1996 pp114-5), the general issue of anonymity must be clarified with those being researched before the project starts. As a consequence, the letter was explicit in terms of reassuring respondents about this. The guarantee of anonymity was also reinforced at initial face to face meetings. Confidentiality and the informed consent of subjects as to the purpose of the interview, are seen as being key ethical issues that must be dealt with by the researcher, see Kvale (1996, p111).

#### **4.6. GATEKEEPERS AND GAINING ENTRY TO ORGANISATIONS**

The early stages of contact did not prove to be a major problem and all eighty two organisations were written to. This was done in three stages. The first being when fifty two letters were sent out, followed a few weeks later, by another twenty three. Later still, a handful of additional letters were sent to fast moving consumer goods manufacturers, when it became apparent that this category of organisation was going to be difficult to get positive responses from. It was decided to stagger the dispatch of letters, so that as replies came back, any research within the organisations could be started with the minimum of delay. It was considered that research in the organisation had to be got under way almost as soon as access was granted. The reason for this was that individuals might not have the time later to be involved, they might move away, or lose interest if they felt that research progress was being conducted too slowly. Additionally, busy individuals might forget that they had been asked to take part in the project. It is also possible that relevant research paperwork sent to respondents can easily go missing, or be destroyed, particularly when it is not directly related to core business activity.

Initial access did prove to be more of a problem after the return of completed tear off slips attached to the letters. These tear off slips indicated whether or not the

organisations targeted were agreeable or not to the research. In principle, a number of companies had consented to be involved in the project, and whilst the process of arranging an interview with some of the respondents was straightforward, for others, the process became more protracted. It proved to be difficult to talk to some managers, due to their very busy schedules and as a result, frequent telephone calls had to be made before an appointment was finally confirmed. In one or two other cases, it was obvious that personal secretaries to key individuals had significant control over diary time. It was important to ensure that they were encouraged to release date and time availability in order to facilitate an appointment. As Hammersley and Atkinson (1995, pp74-9) note, the relationships established with such people can have significant consequences for the research and its course.

Thomas (1993b) indicates that important people in companies are often easily identified and highly visible, but can be difficult to access, having at their disposal gatekeepers who can make penetration of the organisation sometimes difficult. Burgess (1984 p48-49) notes that there may be prolonged periods of negotiation and renegotiation, involving these gatekeepers. This proved to be the case on some occasions, but was particularly noticeable with one company. In this case, the directors personal assistant rearranged a previously agreed appointment on several occasions, resulting in a lot of time being spent in further discussion over suitable times. Finally, a new appointment was arranged, which involved the interviewer in a two hundred mile round trip. On arrival at the destination, the putative respondent was found to be elsewhere in the country. At this point, it was felt unfruitful by the researcher to continue trying to obtain access to this company and further effort was terminated. Thomas (1993b) points out that he found the process of trying to obtain interviews with senior staff in organisations incredibly difficult, involving expense, frustration and lost time. This particular case is largely reflective of his experiences.

#### **4.7. THE INTERVIEW GUIDE**

Kvale (1996 p92), Moustakas (1994 p103), Fielding (1993) and Holstein and Gubrium (1995), recommend that for qualitative interviews, an interview guide is constructed for use during the research. The latter state that,

"...an interview guide can provide the interviewer with a set of predetermined questions that might be used as appropriate to engage the respondent and

designate the narrative terrain." (Holstein and Gubrium 1995 p76).

With some respondents wanting advance information regarding the nature of the questions that were going to be asked, it was considered appropriate to devise and present to them, in printed form, a set of broad topics which they could see prior to the interview. Subsequently, this could act for them and for other respondents, as the interview guide, to be used by the researcher during the scheduled meetings. A copy of this guide is in appendix (2). Thomas (1993b) argues that potential interviewees may in fact test the interviewers qualifications to do the interview before granting access and under these assumed circumstances, careful wording of the questions was considered to be extremely important. Also, some respondents having already agreed to the interview, requested further information beforehand, no doubt in order to help prepare in advance. What was sent, if requested, to all interviewees, was a list of questions, numbering ten, which acted as a broad interview guide for both respondent and interviewer.

With such a wide topic as marketing planning being researched, having the potential to involve virtually everything the business does with regard to marketing, it was only fair and important that respondents had the opportunity to think about issues prior to the interview taking place. Having sight of the questions in advance did mean that organisational members had time to work out very rational responses to some issues, but this was probably partly offset by the fact that no two interviews followed precisely the same pattern. The use of the guide did vary from one interview to the next, in some cases being central to the conversation in other situations becoming rather more marginal. As Fielding (1993) points out, there are limits to conducting interviews in the same way all the time and clearly with an open ended approach, the focus of the interview shifts to the concerns of the respondent. During the interviews conducted as part of this research, very many issues of concern to respondents about marketing and management were raised and discussed and these were not always directly related to strategic marketing planning.

The interview guide for this project then, was intended to be tentative, contingent and not required to resemble the approach used in standardised survey interviewing, see Holstein and Gubrium (1995 pp10-12). As a consequence of the nature of the main data capture process, where the unstructured interview shapes responses to an extent not encountered in survey research, the phenomenological interview cannot be fully designed in the pre field work stage. In determining the

nature of the interview guide the latter's role, in terms of its possible variability, is articulated by Hammersley and Atkinson (1995) when they state that qualitative interviewers,

"...do not usually decide beforehand the exact questions they want to ask, and do not ask each interviewee exactly the same questions, though they will usually enter the interview with a list of issues to be covered." (Hammersley and Atkinson 1995 p152).

The issues on the interview guide reflect the ones discussed earlier, reformulated in order to be able to discuss them with a wide range of managers with different levels of knowledge and experience, drawn from a variety of different industries. In designing the guide, a factor that needed to be considered was whether or not interview questions would be related to, particularly when it was necessary to deal with a range of technical marketing issues, that may appear abstract to some respondents, obvious to others and possibly worthless to a few. In terms of carrying out the interviews, a difficult task was to try and judge fairly early on, the level of rational technical marketing knowledge held by managers. The use of unfamiliar terms, or giving to managers the impression of the sanctity of traditional textbook knowledge, was thought as being possibly detrimental to the interview. As a result of this, it was considered inappropriate during interviews, to refer to written examples of marketing plans or planning processes.

#### **4.8. CONDUCTING THE PHENOMENOLOGICAL INTERVIEW**

For Moustakas (1994 p95), the phenomenological interview should attempt to engage the total self of the research subject and ensure their subsequent full involvement. To assist this process, the approach adopted during this research project was influenced by the thoughts of Bryman (1988 p46) who, in discussing the open ended interview, uses the notion of 'rambling', where the researcher provides minimal guidance and allows considerable latitude for interviewees to pursue their own agenda. This approach makes it possible for the latter to go into areas which most interests him or her. While in these circumstances the researcher may lose some control, the benefits are that data is reached which is central to the person being interviewed. Each interview is hence a different social and data collection exercise. In attaining a phenomenological dialogue, Thompson et. al., (1989), point out that the interviewer

should desire to be a non directive listener.

A practical concern for the interviewer is the manner in which the interviewee responds to the former based on "who we are" (Miller and Glassner 1997 p101). The interview context and the effects of researchers efforts at rapport building can be significant, as pointed out by Hargreaves (1967 pp193-205). The school teachers and pupils he was researching reacted very differently to his presence according to the participant observer role he adopted, which was one of either inspector, or teacher. Hammersley and Atkinson (1995, pp110-12), note that this issue of rapport building with the members of the organisation is a crucial one having a significant bearing on the quality and quantity of research that takes place. In discussing the qualitative interview and various commentaries on its use, May (1997 p118) notes that in order to help build rapport, descriptive questions should be included and the interview should begin with these, enabling researcher and respondent to start to talk to each other in a non evaluative way. On the interview guide for this project, the first question in particular and to some extent the second one, are intended to provide not only some detail about the company and the managers role, but to start the interview dialogue in a relatively undemanding way, thus leading on to more analytical issues later. See appendix (2). For Moustakas (1994 p114), the phenomenological interview can begin

"...with a social conversation or a brief meditative activity aimed at creating a relaxed and trusting atmosphere."

It is the interviewer who is responsible for making the research participants feel comfortable and able to respond honestly and fully. Building rapport can also be enhanced or hindered by the personal characteristics of the interviewer and the latter's presentation of self. This is pointed out by Hammersley and Atkinson (1995 pp83-92), in an illuminating section on the researcher and impression management. With regard to this study, with the researcher interviewing senior managers and directors of firms, the mode of dress adopted was seen as being significant. "At minimum it helps to have clothes appropriate to the situation and to be comfortable enough in them." (Thomas 1993b p83-84). In order to build rapport and to give the impression of sharing similar values to managers, formal business dress was worn to all interviews. Alternative modes of dress may well have produced adverse feelings in respondents, and perhaps consequently have been damaging to the interview process. The interview is in reality an interpersonal drama, where the respondent will be constantly monitoring who they are in relation to the person interviewing them. Identities,

realities, social order and social relationships are constantly being confirmed and reaffirmed in the interview situation (Holstein and Gubrium 1995 pp59-65).

It can be argued that how the interviewee responds to the interviewer is largely attributable to a question of trust. As indicated above in a previous section, the standard letter used in this research went some way in developing an initial level of rapport. Additionally, in the cases of several managers, rapport was also built prior to the interview stage, when arrangements for the latter were being made. This involved telephoning potential respondents and quite often this meant that conversations took place about the nature of the research, so that by the time of the actual interview, virtually no manager had not been spoken to in advance. This significantly assisted the rapport building process. On more than one occasion, it was regretted that these initial conversations had not been recorded in some way, as they often resulted in some illuminating data. It can be argued that the process of rapport building was also enhanced as a result of the interview taking place in a comfortable setting, namely at the managers place of work (Thomas 1993b). Only one interview took place away from the respondents organisation, at the interviewees request, in order to accommodate a travel issue.

As the interview can be seen as being a reflexive conversation, the issues raised are not going to be just about what the interviewer might see as being important. Understanding is attained by describing lived experience and the meanings that emerge (Thompson et. al., 1989). During the course of the interview, Glassner and Loughlin (1987 p35), note that the interviewer should never be judgemental and that they should encourage the interviewee to talk back. The interviews for this study into marketing planning always attempted to be conversational, which often meant they went not always in the direction wanted by the researcher. In this study, respondents were viewed as individual actors, who actively constructed the features of their world. This enabled a sustained intersubjective relationship to be achieved. The latter facilitated the acquisition of some relatively deep knowledge regarding marketing managers perceptions of strategic planning in a range of organisations. It was clear that the interviewer was accepted by respondents, and at all times, genuine attempts were made to understand interviewees experiences in a situation of guaranteed confidentiality. This study is about rapport being seen as a methodology for listening, where the researcher, using the phenomenological interview, can see into the life world of the subject (Kvale 1996 p29-30).



#### **4.9. THE PHENOMENOLOGICAL INTERVIEW: ISSUES OF ANALYSIS**

Phenomenologists interpret the outcomes of interviews through deep understanding, by attempting to develop an intense empathy with the subject of one's inquiry. For Marshall and Rossman (1999, p3), the in depth interview represents an attempt to analyse an individual's lived experience, focusing on the deep perspectives that are held by individuals. Knowledge can be represented as a narrative analysis, where subjects have the opportunity to tell a story, where each interview constructs reality in its own way. This shifts attention away from notions of one objective and measurable reality associated with marketing planning. From a phenomenological perspective, we are asking what meanings marketing managers associate with marketing planning and not whether this represents reality for other organisational members as well. In terms of analysing and representing the material from the interviews that have been conducted, the issue does not become one of displaying and coding data. This can be seen as representing an attempt to identify an objective external world. In the phenomenological analysis of an interview, the issue is to decide how the conversation can best be reconstructed in order to retell the original story told to the researcher, by the interviewee, see Kvale (1996 pp199-201).

In phenomenological analysis, the common mode of presenting the findings of interview inquiries is through the use of selected quotes (Kvale 1996 pp265-6). These interview quotes give the reader an impression of the interaction of the interview conversation, exemplifying the material used for the researchers analysis. Kvale (1996 pp193-6), also points out that analysis enables the process of meaning condensation to occur. Here, the analyst must break down the interviewees responses into meaning units and then examine these in terms of the themes of the study. This technique is seen as a key method to phenomenologically analyse interview data, see Giorgi (1992;1994). Meaning condensation facilitates an open phenomenological approach, where the researcher tries to understand the world from the subjects point of view, wanting to know what the latter knows in the way that they know it.

Phenomenology is concerned with the understanding of wholeness and examining an entity from many perspectives, until a unified vision of the essence of an experience is achieved. In order for this to happen, Giorgi (1994, p208), advocates a " ...dwelling with data, allowing time for intuitions to develop, and penetrating the data to a depth that is appropriate. " Phenomenologically, the meaning for the participant must clearly

be captured, but this reality will also be taken up by the researcher and interpreted in the latter's language. Also, because it dispenses with coding and categorising, it does not mean that the process of phenomenological analysis is not rigorous. The procedures elucidated by Hycner (1985) makes this very clear, where the reverse is probably true. Giorgi (1994) and Moustakas (1994 pp120-1) are also both interested in demonstrating how rigour and discipline can be applied to the data resulting from interviews, without having to transform findings into quantitative expressions. For Hycner (1985), the focus is on showing how data can be dealt with systematically yet still be expressed in terms of ordinary language. The essence of the approach involves familiarisation of the interview transcripts through rereadings and the initial casting of the text into clusters of general meaning. These units are then organised into condensed themes which reflect the research questions and issues (Hycner 1985). In phenomenological analysis, as noted earlier, no explicit coding takes place (Miles and Huberman 1994 p8) and the researcher looks for key themes in order to find accounts of essences. For Miles and Huberman (1994 pp86-7), this represents the process of looking for patterns and themes in the generation of meaning.

One area that receives considerable attention in much qualitative and quantitative research is the notion of reliability and whether other researchers are likely to be able to replicate and confirm findings, see Miles and Huberman (1994 p29). Kvale (1996 pp180-2), warns against too much emphasis on intersubjective reliability, suggesting it might lead to a tyranny by the lowest possible denominator, where an interpretation is only reliable when everyone can follow it. This criterion he argues might lead to a trivialisation of the interpretations. There should not be too much emphasis on method of standardised techniques. He points out that

" The search for techniques of analysis may be a quest for a 'technological fix' to the researchers task of analysing and constructing meaning." (Kvale 1996 p180).

Importantly in phenomenological analysis, the text of the interview must be treated as an autonomous body of data (Thompson et. al., 1989), composed of respondents reflections on lived reality. Autonomous in this context means that there is no attempt to corroborate the interviewees descriptions with some form of outside verification. The latter implies that the researcher should attempt to verify the subjects reflections using other external methods and criteria. In support of this Denzin (1970, p129), advocates the principle of triangulation. Caution is important here however, as a

retrospective reality based on individuals perceptions may not be properly captured simply by using a variety of research methods. Also, what goes on in one setting may not be the same as what goes on elsewhere. Each must be understood on its own terms (Silverman 1985 pp95-116). From a phenomenological perspective, the main relevant issue is that at the time of the interviews, the marketing managers saw particular phenomenon as important and the purpose of this research is to try and understand the latter. To emphasise the point, this is research on perceptions and not on a verifiable external world.

#### **4.10. THE INTERVIEWS AND THE PROCESS OF ANALYSIS**

With regard to actual analysis of the interview data, the phenomenological guidelines laid down by Moustakas (1994, pp103-19), Hycner (1985) and Giorgi (1994), were broadly followed. Firstly, before any analysis could take place, a decision had to be made regarding how the data to be acquired in the interview, would be processed. With regard to this study, all twenty three interviews were tape recorded. Importantly, other researchers have access to data about which claims are being made, facilitating public scrutiny and allowing re-examination in the context of new research. Without a tape recorder, much data can be lost. Many researchers advocate the use of a tape recorder, three examples being Willis (1977, p5) Walker (1985, pp110-113), and Heritage (1984). The latter points out that,

"The use of recorded data is an essential corrective to the limitations of intuition and recollection. In enabling repeated and detailed examination of the events of the interaction, the use of recordings extends the range and precision of the observations which can be made." (Heritage 1984 p238).

With the discussions being taped, Walker (1985 pp110-13), indicates that there may be the problem of machine phobia on the part of the person being interviewed. For those respondents who took part in this study, machine phobia was never a problem however. On one or two occasions, there was some nervousness at the start of the interview as a result of the request to tape it, but the presence of the machine never interfered with the usually smooth flowing interaction. No respondent ever asked for the recording machine to be switched off.

Kvale (1996 p163) notes that the transcription of tapes is itself an interpretative

process. Furthermore, it is a long, tiring and stressful process as well. Questions that might arise relate to factors like length of sentences, where is there a pause in the conversation and should it be noted? Also, different transcribers may type the tape in different ways. Transcribing involves translating from an oral language with its own set of rules, to a written language with another set of rules and the latter can be seen as a map, a representation of some original reality. In general terms, the interview transcript can be seen as a decontextualised conversation, where social, spatial and temporal dimensions can be difficult to report on.

In terms of processing, all interviews were transcribed professionally by a secretary who was asked to follow a particular approach. The interviews were reproduced verbatim and nothing missed out. The structure of the transcript followed a set pattern where there was a dialogue between a 'Question and an Answer' and all interviews were typed in precisely the same manner, with the typist determining where sentences started and ended, thus ensuring a degree of reliability across all interviews. These were checked for accuracy from the researchers perspective as well, during the frequent rereadings. On a reflective note, Kvale (1996 p170), points out that there are few standard rules in transcription but rather a series of choices to be made. Generally, the tapes were of good acoustic quality and no problems emerged in typing them up. The resulting transcripts were returned to the interviewee for verification, a process Bloor (1978) refers to as respondent validation. This also made possible further clarification by subjects. A number of the transcripts were returned with comments on them in places and with some changes to spellings. No subject felt that their views had not been inadequately rendered. In support of the general approach adopted here, Thomas (1993b) points out that the researcher must not hesitate in sending transcripts back to the interviewee, as this can prompt additional data and also keeps lines of communication open.

The very first aspect of analysis preparation started with the setting up of a journal, as advocated by Hycner (1985), for phenomenological interview research. The journal contained all the transcripts and the subsequent analysis notes of the interviews as well. If stage one in the actual analysis process is transcription, then stage two is bracketing, which follows the process of phenomenological reduction Moustakas (1994 p33-4). The recordings and the transcriptions were approached with an openness to meanings. Here, the researcher had to suspend (bracket) as much as possible his own meaning and enter into the unique world of the marketing manager being interviewed.

This stage is a necessary prerequisite to all other stages in the analysis process. Next, at stage three, several listenings to each tape took place, along with rereadings of the transcripts. This facilitated the acquiring of a deep sense of understanding about the whole interview, a requirement of phenomenological research, see Hycner (1985).

Following on from this, at stage four, each tape was analysed in turn and then a set of analysis sheets written up for each interview, in line with the following procedure. Firstly, the tape was listened to and checked for accuracy. If necessary, the transcript was corrected. Occasionally, words had been missed out and were subsequently inserted. Some spelling errors were evident and in a few cases, the typist had not managed to catch the words of the respondent. Having made all the necessary corrections, a summary was written of the interview. This provided a useful general overview. This summary was entered up in the journal on an analysis sheet. The next process was about meaning unit generation, which involved determining the general meanings present in the words and phrases of the subject. This process was about crystallising and condensing the respondents' views across the whole interview and resulted in a range of general meanings being generated, as advocated by Hycner (1985).

These meaning units were noted on the individual transcripts in the form of numbers, directly alongside the actual words of the respondents. Comments about the meaning unit were also recorded (using numbers that corresponded with those written on the transcripts) on further analysis sheets, following on from the general summary of the interview. For most interviews, there were approximately twenty general meaning units generated, which were not exclusively about marketing planning. No common set of numbers were used. Each interview generated meaning units which were allocated a number, from one upwards. The amount of numbers used depended on the length of each interview and also on how many general meaning units were generated by the respondent in the first instance.

Stage five was thematisation. Using this procedure meant that those themes which dominate the natural meaning units are stated in the journal (Hycner 1985). These themes represented the interrogation of the meaning units, in terms of the particular issues of this study. By necessity, some of the original meaning units were made redundant for the purpose of this inquiry as the researcher had to address the research questions to the units of general meaning previously identified. The number

of key themes across each interview did vary. Usually, there was about five to eight and they were listed in the journal, on the analysis sheets, immediately after the statement of general themes for each interview. Thematisation was completed finally, by the writing up of a full narrative summary which was intended to reflect the key issues of each interview. At this point in time, the journal contained all the interviews and following each transcript, was approximately five sides of written analysis. An examples of a transcript and analysis sheets, is contained in appendix (3). For the purpose of clarity here, no meaning unit numbers are present on the transcripts in the appendix, as these were all entered by hand.

Throughout the whole process of interviewing and early analysis, it was clear that the interview material was saturated with metaphors. Although the broad meanings of metaphors are often socially shared, the case here was that they appeared to be subjectively interpreted, representing an individually constructed perspective on the world. In the interviews, this approach seemed evident in terms of how the managers thought and acted on marketing issues. As Miles and Huberman (1994, p250) indicate, metaphors have an "...immense and central place in the development of theory.." This was a point made in chapter three, an argument helping to provide a rationale for using metaphors as explanatory devices in this research. Furthermore and in line with a phenomenological perspective (Prange 1999), it became clear that the metaphors used by the marketing managers had very individual meanings. These meanings were given context by the managers conversations about marketing practice. Also evident about the managers responses was a narrative, story telling style, which assisted the researcher in developing the key recommendation of this study, which is the 'strategic marketing signpost', as discussed in chapter nine.

Stage six of the analysis process involved then, going through the entire set of transcripts again, in order to draw out and to list, the metaphors used by the marketing managers in this study. Initially, about thirty metaphors were identified and these were separated into major and minor ones, the former providing the frameworks and headings for all of the sections in the analysis chapters. Miles and Huberman (1994 p252) warn against looking for overarching metaphors too early in the study, advice that was taken in this research project. They argue that it can distract from fieldwork, leading to hasty judgements that welds the researcher all too quickly to the metaphor. The suggestion is made by Miles and Huberman (1994 p252), that the researcher waits until a strong body of information is available which can be drawn

from. This recommendation was followed in this study. Some metaphors were mentally noted by the researcher early on, but a systematic approach was not adopted towards them until some way into the final analysis stage of this research.

At stage seven, the next part of the final analysis took place. A data matrix was drawn up, a technique advocated by Miles and Huberman (1994 pp93-6). It is essentially the crossing of two lists. In this case, the key themes of the whole research were listed down the vertical axis and on the horizontal axis, the names of the organisations featured in the study. Key themes emerged only after intensive rereadings of transcripts and analysis sheets. The matrix approach was used not in any way to replace transcripts and analysis sheets, or to simply be a mechanism to facilitate the counting of meanings. Problems inherent in this latter approach were dealt with in chapter three. Following on from the construction of the matrix, a series of ticks was entered, showing cases where marketing managers responses corresponded with the study's key themes. In the following analysis chapters, different sections of the matrix have been included, appearing in an adapted form, where they relate to the discussion of themes.

On the matrix, all key themes were numbered, e.g. T1 T2 T3, etc. Then, the analysis sheets for each interview were returned to, and these key theme numbers were entered alongside the central themes which had been earlier elicited from the interviews. This enabled the researcher to later move between a range of analysis sheets and transcripts, in order to clearly pick up on the central themes of the study, as well as the 'locally' important themes in each interview. To make a general point here, Miles and Huberman (1994 p93) indicate that there are few familiar agreed methods on how to do data set-ups among qualitative researchers. As a consequence, each analyst has to adapt those of other researchers, or attempt to develop new ones of their own device. The particular data display matrix used here by the researcher has not been seen before, and was developed as a fairly straightforward method to initially bring together highly dispersed and bulky research material, covering very many words and many pages. In conclusion, the data display matrix proved to be a useful starting point in developing a familiarity with the key themes. Later in the analysis chapters, the matrix proved helpful as a basis for summarising the interviews in table form. Importantly, the matrix was never used, or intended to be used, as a substitute for the phenomenological method, which requires a close and deep understanding of the subject (see Goulding 1999).

At stage eight, the interview transcripts, the analysis sheets and the data display matrix contained in the journal, were gone back to, and an overall summary of all the interviews completed which incorporated the themes elicited from the data. The final summary provided a sense of the whole and resulted in the main themes being drawn out of the data. This final summary was in the region of five thousand words. Discussed and analysed then, were the themes common to all interviews. Additionally, key individual variations present were noted, both by individual marketing manager and by industrial sector. Stage nine involved the writing of a shortened version of the final summary, which was sent out to all interviewees. It was considered important to send respondents a shortened summary, due to the relatively long length of the original. The intention was that interviewees would be prepared to examine the themes presented to them, as advocated by Hycner (1985). This process assists in confirming the themes of the study, from the perspective of those being researched. Responses to the summary proved to be slow, but no managers took issue with the themes that had been identified and discussed. Two managers made immediate contact asking to generally discuss the research findings in more detail and one requested a conference paper written by the researcher on marketing planning, see Ardley (2000). Several other managers wish to receive a final copy of the research project, or a paper based on it.

Finally, at stage ten, another checking process occurred, where the researcher asked independent scrutineers to examine and comment on the themes that had emerged from the data. Thompson et al., (1989) refer to these as the interpretative group. This was useful, as it helped to establish that the researcher had been rigorous in bracketing presuppositions, and developing themes. This checking process can be related to the idea of validity. For Hycner (1985), a validity check is provided by other researchers making a contribution. What matters is that it becomes important to formulate explicitly the evidence and arguments that enter in to an interpretation, so that these can be assessed by other researchers. The investigator should present examples of the material used for interpretations and explicitly outline the different stages in the analysis process. To check the research findings here, two students in the final semester of a B.A. (hons) marketing degree, with knowledge of the area of planning, were asked to verify themes. They were given access to all transcripts, analysis and general summaries and over a period of four hours, interrogated the material. The result was that the themes were confirmed, as indicated in appendix (4).



#### **4.11. CRITERIA FOR JUDGING THE QUALITY OF PHENOMENOLOGICAL RESEARCH**

At this point it is useful to draw together some key ideas which relate to judging the quality of research, before embarking on a discussion of the findings of this particular project. Considerable time has been devoted in these early chapters to explaining the nature of the research undertaken and the approach to analysis that has been adopted. This it is argued, fulfils a key criteria of Marshall and Rossman's (1999 pp196-8), for assessing the soundness of qualitative research, namely, that the design and methods of the study are explicitly detailed. This research it is argued, also meets their other criteria, which relates to (1) the work being situated in a scholarly context, (2) records have been kept and (3) it has been made clear how the data is to be interpreted and made relevant to the research questions posed (Marshall and Rossman 1999 pp191-202).

Although operating from within the qualitative school, from a more traditional perspective on research, Silverman (1993 pp144-170) and Perakyla (1993), point out that despite the fact that research is qualitative, does not imply that it can escape the conventional issues of reliability and validity. With regard to reliability, the question is asked, would the researcher expect to obtain the same findings if the research was tried again? In this case, reliability is equated with consistency, where it is expected that over time the results of the research will be the same (Gill and Johnson 1997 pp91-2). This conventional view of science also means that research should be designed so that what is measured is what was intended to be measured. Conclusions must be valid, where validity refers to truth in research and the extent to which an account accurately represents the phenomenon under study. Bryman (1988, pp87-91) raises the issue about the generalisability of qualitative research, pointing out that there is some concern about the extent to which findings are representative of wider situations and contexts.

Marshall and Rossman (1999 pp192-5), indicate that an alternative view on qualitative research is presented by Lincoln and Guba (1985), whose work they cite. Lincoln and Guba propose four criteria of soundness as ways to judge qualitative research. These they suggest, more accurately reflect the assumptions of the qualitative paradigm than the borrowing of traditional positivist techniques. The first criteria is credibility. They

argue that the inquiry has to be conducted so as to ensure that the subject was accurately identified and described. An in depth study which shows up the complexities of the situation will be so embedded with data derived from the study that it must be valid. The second criteria is transferability. It should be possible to argue that the findings will be useful to others and the researcher must be able to demonstrate how the results will fit into a body of theory and how it relates to other settings. Here, this research will contribute to the developing theory of marketing planning. Research questions have been clearly identified and the complexities of marketing planning as related to the perceptions of marketing managers explained and discussed.

The third criteria is dependability, where the researcher has to account for the changing conditions in a phenomenon. For qualitative research the world is changing, and individuals perceptions alter. These must be adequately accounted for. Marketing planning and marketing is about managing and accounting for change (Mercer 1996 p101). By implication, the world of the marketing manager changes as well and an attempt has been made to capture this. The final criteria is confirmability and as Marshall and Rossman (1999 p194) note, this captures the traditional concept of objectivity where the findings can be confirmed and verified by another. It can be suggested that whilst the first three criteria are acceptable to those carrying out a phenomenological investigation, the final criteria must be questioned and the notion of confirmability reinterpreted.

To broaden the point, this issue of confirmability reflects what is often seen as a key problem in qualitative research, which is the question of biased subjectivity see Kvale (1996 p212). It is argued that researchers notice only evidence that supports their own opinions, in consequence, selectively interpreting research material. To address this issue of objective notions of confirmability, Kvale (1996 p212) advocates a 'perspectival subjectivity' where researchers adopting different perspectives pose different questions to the transcripts and come up with different interpretations as to their meaning. To make this work effectively however, what needs to be made clear is the researchers precise perspective on the transcript, making the interpretation comprehensible. Here the interpretative group mentioned in the previous section can have a key role to play. With the researchers questions posed to an interview passage apparent, several interpretations can be seen as not a weakness, but as a strength. The role of the interpretative group in this research study was not to undertake such a

role, but clearly they could have done so. If asked, they may well have come up with entirely different themes, related to different areas of marketing. The key point is that the reader, in adopting the same viewpoint as the researcher, can also see what the latter saw, which was the case with the research here. All this suggests that we are clearly moving away from the conventional view of validity, where the findings of the research have to correspond with an objective reality. For Kvale (1996 pp241-44), the concept of validity is reworked, becoming instead a process of checking, questioning and theorising the data. This is the notion of validity as craftsmanship and appears to mesh in well with the general approach to phenomenological research and analysis.

For Kvale, the in depth qualitative interview does not have to conform to what he refers to as the 'scientific holy trinity' of generalisability reliability and validity. (Kvale 1996 p229). Nor does it have to conform to Lincoln and Gubba's notion of confirmability. Truth in research is specific, local, personal, community based and socially constructed. In terms of this research it is important to know what the locally constructed worlds of marketing managers are about, if not composed of structured planning systems. The conceptual marketing literature may present the idea of 'plan' differently to the way a practising marketing manager might. The former represents the belief in an objective world and is the basis of a modernist conception of truth. In this scheme, there is only one correct view of the independent external world. From a phenomenological perspective however, knowledge becomes socially constructed. The approach does not search for one true meaning, but emphasises differences and paradoxes. Knowledge claims emerge as conflicting interpretations are discussed and negotiated. This suggests that there exists a legitimate plurality of interpretations through interview analysis and bearing this in mind, it is to the results of these interviews that we now turn.

#### **4.12. STRUCTURE AND OUTLINE FINDINGS: PRESENTATION OF THE ANALYSIS CHAPTERS**

In this section the intention is to provide an outline overview of the subsequent findings and the approach to analysis that is taken in the next three chapters. One way to achieve a qualitative write up is to present the participants perspectives so that the latter's world view forms the structural framework for the report (Marshall and

Rossman 1999 p158). The analysis chapters of this study follow very closely this approach. The chapters in question are divided into sections and organised around key metaphors used by interviewees, as they seek to explain the nature of various processes in their organisations. As argued earlier, metaphors are seen as a rich basis for explaining what is going on in organisations. Metaphors, taken from the words of the interviewees, provide frames of reference for understanding, not only for researchers but for practising managers as well, see Dunford and Palmer (1995).

In this study, the relevance of findings for existing theoretical positions is also explored regularly, throughout the next three chapters. Particular principles of procedure in terms of presenting the quotes used have also been adopted, which broadly follow those laid down by Kvale (1996 p266). In the analysis write up, the quotes have been contextualised and interpreted in order to show what viewpoint is being illuminated. It is important to ensure that a balance has been struck between quotes and text, with the former not being too long Kvale (1996 p266). Additionally, pauses for thought, repetitions and occasional digressions are omitted from the quotes, to be replaced by a simple symbol, thus.... The intention here has been to render the interviewees spontaneous oral speech into a coherent textual form as far as is possible, taking care not to distort original statements.

With regard to the structure of the analysis, chapter five starts with a more detailed introductory view of the organisations than previously presented, by considering issues of size and success from the view points of the interviewees. The next section raises the important issue of how managers perceive marketing. Diverse views on what constitutes the notion of marketing informs the ways in which managers implement it, with all the tendentious implications that this holds for the standard marketing model (Kent 1986) The next section in this chapter deals with the issue of culture. The traditional model assumes that a systems based view of marketing has culture as a variable that is structurally determined. It is significant here that a number of marketing managers regard it as being extremely difficult to develop a single cultural perspective in their organisations.

If we consider the structure of the conventional marketing planning process, it starts with the collection and interpretation of data from the business environment (McDonald 1999 pp6-7). The next two sections of chapter five deal with the very important issue of environmental analysis. The managers here appear to individually

produce aspects of the environment they face as Weick (1995 pp30-38) suggests. The environment is not a fixed objective entity, but is embedded in the local context and local rationality of managers' worlds (Smircich and Stubbart 1985). Findings here show that little attention is paid to examining the environment using a structured process and additionally, conventional marketing research is neglected in favour of other more informal information gathering methods. For Daft and Weick (1984), managers must wade through an 'ocean' of events, constantly interpreting. For the marketing managers here, there appears to be little relevance attached to the carrying out of a full environmental analysis. Again, this represents another aspect of marketing practice which confounds the traditional model.

With regard to chapter six, and central to the conventional marketing decision making process, are the analytical tools, a set of overarching objective models which are, in theory, an important and indispensable aid to the manager, see for example Piercy and Morgan (1994). Both Simon (1994) and Meldrum (1996), draw our attention to the general problem of whether marketing theory tools are applicable to the work of marketing managers. In the traditional marketing planning model, after the environmental and market data collection process has been carried out, it is the case that a range of tools can be deployed to help analyse the current situation and aid future marketing decision making. Findings here are mixed. A number of managers use the tools in a limited way, expressing some concerns about the methods. Conversely, other managers see no relevance for the analytical tools and consequently do not feature them in their marketing approaches.

Not part of the 'practical' theory which managers work with is the conventional model of the marketing mix. The interviews show in the next two sections of this chapter, that what does have important roles in the marketing offerings made by these managers to customers is quality, service and relationships. None of these feature prominently in marketing textbooks, or in the models proposed by the traditional approach to marketing planning, a point noted by Gummesson (1993). For the latter, quality and service are the central aspects of the marketing offer a customer should receive and therefore need to be a key feature of strategic thinking. In the final section of chapter six, a major theme emerges in relation to marketing decision making. The interviews point out that central to the thinking of the managers in this study is a local logic, reflecting the findings of Boden (1994 pp193-8). This local rationality is clearly evident in the nature of the actual marketing plans that are

constructed and in the processes managers use to make decisions about marketing. Virtually without exception, marketing plans are prepared, but the interview findings suggest that they are often idiosyncratic, context bound and context dependent. As Whittingdon (1996) perceptively notes, strategy is not the same for everyone. The content of the plans often deviate considerably from the structures of the traditional model and there are more differences than similarities between the plans described. In constructing their plans, it is clear that managers draw extensively on practical experiential knowledge, rather than on traditional marketing planning theory.

Whilst the traditional tools and techniques of marketing decision making are to an extent rejected by the managers in this study and plans are constructed which reflect and direct a local logic of action, there is still a need to know in more detail how decision making occurs. This whole process is explored in the final analysis chapter. The first section of chapter seven indicates that the managers in this study develop strategy in on going sequences, see for example Wrapp (1984). Strategy emerges not out of traditional linear marketing plans, but out of current situations and opportunities. The majority of managers regard their plans as fluid and flexible and will not hesitate in moving outside them if the need arises. There appears to be a constant reflexive and retrospective quality to decision making, a point argued by Weick (1995 pp24-30). Managers make sense out of past experiences and then develop strategy as an ongoing stream of events. The second section of this chapter takes this emergent strategy theme further, and looks at another context in which it develops, which is from within relationships and networks. There is considerable evidence presented in this section to demonstrate this contention. Furthermore, in the context of relationships and networks, it is argued that negotiations are a central and on going part of the decision making process, a point supported by the recent work of Gilmore et al., (2001).

The next section of chapter seven discusses the process of 'talk', demonstrating another way in which strategy is developed in an on going and emergent way. Talk is very important in terms of decision making, but is often neglected by traditional models of planning and decision making, with their macro type emphasis on structures and systems (Boden 1994 pp3-4). The latter argues that the omission of a micro social action perspective prevents a proper understanding of the reality of organisational life. The study here shows that managers see talk as a central aspect of their working activity. Meaning and subsequent decisions evolve largely through the

process of interaction. Furthermore, this whole process can be seen to take place in organisational networks and relationships. Drawing on the evidence accumulated in this study, it is clear that strategy is made, sustained and changed, as a result of talk. For Woodilla (1998), meaning is socially constructed and enacted in organisations through conversations.

Baumard (1999 pp135-6) and Mintzberg (1987), argue that another important context out of which decision making develops is based within the domain of tacit knowledge. Evidence is produced here in this current study to show that some decisions are tacit, the result of gut feelings, and of intuition. This represents an important part of marketing decision making, as Hackley (1999) points out. Managers 'sense' what is the required decision to take. The tacit is unarticulated, a reservoir of wisdom and experience which the marketing managers in this study bring to the decision making process. In the next section, the argument made by Mintzberg (1987), that managers work in organisations is fragmentary and based largely within the stream of events that represents the current situation, is given weight. This section deals with the conflicts that managers generally experience in their work, emphasising some of the earlier findings of this study. Conflicts that are discussed here are ones which exist between planning and future strategising and the demands of dealing with day to day events. For many managers, the work is about being immersed in what Weick (1995 p44) calls a situation of 'thrownness', where the present is a problem that always has to be dealt with.

The final section of this chapter is concerned with trying to resolve what might appear to be some contradictions existing in the findings of this study. What must be realised is that reality is multifaceted and a major strength of qualitative research rests in its ability to uncover complexity (Miles and Huberman 1994, p10). Whilst it has been made evident that marketing plans are drawn up, it is also clear from the sections above that these plans are not strongly adhered to. Many managers point out that strategy is developed outside of them by way of talk, relationships, intuition and through on - going circumstances. What purpose the plans fulfil, bearing in mind that they represent the local environments in which managers operate, are to act as cues, in much the way Weick (1995 pp49-55) suggests.

It can be argued that the evidence here suggests that plans induce activity, enabling organisational members to move forward, with a sense of direction. It is postulated

that plans do not represent enacted reality, but are general guides to it. This, and the other findings outlined above, suggest that the present way in which marketing planning is understood to work, may need some urgent and radical revision. Taken all together, these analysis chapters critically examine the various sequential stages of the marketing planning process, showing the alternative approach to decision making. The grounded reality of marketing decision making and strategy is revealed, an alternative reality based within the world of experience, rather than within the confines of abstracted theory.

On a point of presentation to end this chapter, Kvale (1996 p275) suggests that while interview data is of a verbal nature, the possibilities of presenting the results in visual form should not be overlooked. Whilst it is usually accepted that the phenomenological report of research concentrates only on textual verbal material, see Moustakas (1994 pp120-154) and Hycner (1985), it was noted in the previous chapter that an aid to theme development in this research was the construction of a relatively simple data matrix which served as a useful analytical framework. The matrix appears in amended form here, as a series of three tables, at the end of each of the analysis chapters. The intention is for the tables to act as 'signposts' and as summaries to the content of the material being presented and analysed. The tables are not intended to represent clear unambiguous categories for counting; they cannot capture the complex multifaceted nature of reality which the managers in these interviews discuss and to which we now turn.



## **CHAPTER FIVE**

### **EXPLORING MARKETING MANAGERS PERCEPTIONS: SUCCESS, MEANING AND ENVIRONMENT**

## **5.1. BIG TANKERS AND LITTLE FLOTILLAS: SIZE AND SUCCESS IN THE RESEARCH ORGANISATIONS**

Wallemacq and Sims (1998), believe that what most fully illustrates the phenomenological stance is story telling. In the coming chapters, there are many examples of managers telling stories. These stories are often linked to metaphors. Sometimes the stories are short, sometimes they are longer. Whatever their type, they represent a way for managers to make meaning from experience in relation to marketing planning. Firstly, there are the stories about the organisations of this study. In chapter four, an outline was presented of the organisations researched. In this, and the next section of the current chapter, the firms that have been researched will be introduced more fully. One factor not considered earlier was the extent to which these organisations can be regarded as being successful in business and marketing terms. This is an important area to consider. It might be possible to argue that the marketing managers here may not have been prepared to be interviewed if their organisations strategies were failing. Apart from this point, the subsequent discussion and analysis of the research will show that a significant number of the organisations examined do not utilise marketing planning in its traditional sense, in the way laid down by authors such as McDonald (1999 p40) and Jain (1997 pp21-40). Furthermore, it is argued that the reality of marketing decision making is actually grounded in factors that the traditional model takes little account of. If the organisations of this study prove to be unsuccessful, then any arguments about alternative visions of marketing philosophy and practice will be suspect. It must be shown that these differing perspectives bring success. The following section will attempt to indicate the level of this success, as perceived by the marketing managers being interviewed.

If we are employing metaphors as a mode of thinking about organisations (Mangham 1996), then an appropriate one is required to deal with this general issue of success. Working from within an interpretivist perspective means that the metaphor must be drawn from the words of the research respondents (Prange 1999). Nelson Universal is one of the larger companies in this study, known not only nationally, but internationally as well. The marketing manager of the general insurance area of Nelson Universal points out that, "...we are a big tanker". Oil tankers can be of enormous size and capacity. Nelson Universal has considerable resources and operating capacity and can be regarded as one of the biggest 'tankers' a float.

The division of Nelson Universal that is general insurance is part of this big tanker. Robin Cawley, the marketing manager points out that,

"...the bit I am talking about is still annually over £100 billion premium income, so huge amounts of money. In the last few years we have generated around about £100m of profit. We are market leaders in a number of the markets we operate in. You know, we are just a very big, well known organisation in the general insurance market within the UK."

Another 'big tanker' is Henry Armstrong, a major manufacturer of paint brushes. Sheila Harris the marketing director, indicates that the company, which operates in the domestic and trade markets is,

"...number one in the professional market already anyway, and have been for ever, we have got over 50% share, no one else comes remotely close to us. In the DIY sector we are joint second."

Also among the big successful tankers are Stirling Publisher, which has a turnover according to Jason Hobart, the marketing director, of between £60 and £70 million per annum, coupled with what he terms a sizeable margin. Paul Peters, marketing planning manager of Earlham Newspapers, stated that his is an £80 million turnover company. At the time of the interviews, Earlham had just taken over a rival group. No figures were forthcoming from Mike Clark, the marketing manager at Vincent Duke, a financial services organisation. Vincent Duke is however, part of a very much larger group that has been extending its brand into many new areas over the last few years. In another business area, Michael Marston is promotions and marketing manager at Archer Television. This too can be seen as another 'tanker.' He states that,

"Our main source of revenue comes from the sale of airtime, something like 87% of our turnover, which last year was about £140 million."

Although Nelson Universal and organisations like it, represent the larger more successful ships, others also ply their trade on the seaways, albeit on a smaller scale. In reality many of these might be regarded as medium sized to smaller organisations. Robin Cawley of Nelson postulates that these represent the smaller ships, what he calls the "little flotilla."

In this 'small ship' category, we can include organisations like Mitre Technics. The latter is in the micro electronics industry, selling very specialist equipment to niche

markets. The company performs with success, winning every year, for many years now, an award from Hewlett Packard for quality and delivery. During the course of the interview Gordon Willis, the managing director, drew the researcher's attention to a display cabinet where many awards were featured. At Thor Engineering, Clive Terry, the technical sales manager (which includes responsibility for marketing) indicates that his business-to-business operation is currently performing well. The present £10 million turnover is growing quickly.

"...the company is split into meat slicing and packaging machinery and bag sealing equipment. The bag sealing equipment applies yellow tape to bags of pre sliced bread, very big in the UK and we have just done £2 million of business in Australia where they have converted completely from plastic clips to our seal."

Jenkins Department store is a successful local retailer, but clearly has to be seen as one of the smaller 'ships' with a turnover of £26 million, the latter figure being provided by Roy Sands, the Sales and Marketing Director. Part of the same family business is Jenkins Print. Irving Wallace, the Marketing Director stated that,

"The printing site, we are one of the largest co-ordinated print sites in the country, and we have three very large presses which print 64 pages a turn and they are turning 30,000 times an hour so there is a fair amount of throughput."

Merry and Right are another local, successful organisation, with a wide customer base. Nick Catt, marketing manager tells the story.

"We are a law firm and have been in Newfound for about one hundred years. As with all large law firms, we developed a more commercial client base and so a lot of our services today are to large organisations or institutions, so, for example, the university is one of our most prized clients. We have a lot of higher education clients...so the clients of the firm, besides being local businesses and local individuals, we tend to focus on higher education, health care clients, we have a lot of NHS trusts, insurance companies...agriculture...other businesses in food chains, packers and processors, food retailers. And we try to provide as full a range of services to those clients as we possibly can and increasingly developing those services."

In another business-to-business marketing situation, Lewis Stuart's sales and marketing manager Trevor Cole did not discuss company profits or turnover during the interview. He did point out that his company, which occupies a relatively small

factory site producing motors for use in industrial equipment, had a notable success.

" We still have the high voltage motor division which is the traditional product as far as this site is concerned, but that has really boiled down to attacking the oil and gas industry offshore. We as a company have more motors in the North Sea than any other motor manufacturer."

Also in the organisation-to-organisation market is Leighton Jay Technical Services. The marketing director of the group David Borrows, was interviewed for this study. Started on a local basis by an ex-college lecturer, with an engineering background, this organisation provides computer packages for vocational education. The company now has extensive markets around the world and has developed considerable expertise in the education market. The story since 1984 is that,

" The company has grown and grown and developed different divisions and we are into a very much broader market area. We sell from kindergarden right through to twelfth grade which in the USA covers most of their education system. Above that we then have a whole range of vocational products which in the UK you would see as sold into post education and almost all our products now are computer based...we have a consulting division which does consultancy for overseas contracts...in the USA, we have a corporate headquarters...and we also have regional sales and training centre...We are selling to really almost everyone who has got money and can speak English..."

Samsons is a building contractor featured in this study. Some of the work they take on is significant in terms of size of project and income. Mary Stone marketing manager said that,

" We do a lot for housing associations...we do a lot of maintenance work...we do projects up to £5 million. We did a fabulous one last year in Ketts Oak...that was about £3 million."

Some of the business organisations here are expanding and developing. In professional services, Evertons is a national law firm with 1,200 lawyers. Richard Coates, their marketing manager comments that, " Now we have twelve offices, a couple overseas, we would like to have another couple overseas come August, when our London office merges with another firm." As another example of growth, Tucker Internationals marketing manager Melissa Jones points out that the meat processors current site " has been expanding ever since 1961, so it is getting bigger all the time and we have now also bought another area across the road. "

These views are representative of the rest of the organisations in this study, who also will be more fully introduced in the next section. The information above suggests that in terms of the individual perceptions of marketing managers, these companies are performing well, a finding which is summarised on table one (a). An interesting point to note is that the notion of success has not been interpreted in a consistent fashion across all interviews. Whereas the conventional model of marketing planning indicates that there exist very specific measures of evaluation and control to measure marketing success they are not present in the words of the managers interviewed. For Kotler (2000 pp696-713), the language of success is standardised; there are results from market based scorecards, marketing expense to sales analysis and other clearly delineated financial measures. If conventional marketing planning had been that widespread, then it is likely that managers would have responded using it's terminology and logic more readily.

This objective way of measuring marketing success is also present in the work of those who advocate the importance of marketing metrics (Davidson 1999). This approach might be representative of conventional marketings attempt to achieve parity with high order scientific disciplines, where everything can be reduced to quantifiable variables, see Knights and Odih (1999). What is apparent in the data above is that when asked to discuss success, the managers of this study choose very individual modes of expression. Clearly figures were cited, but not in the way the traditional planning model would advocate. The data here would suggest that the notion of success and what it means, is a concept which is relative to temporal, situational and individually perceived factors. It must also be considered that, as many companies have shown, success can be a very fragile commodity, one which can easily change to failure (Doyle 1992).

## **5.2. NAVIGATING THE TANKERS AND THE FLOTILLAS: MANAGERS MAKING SENSE OF MARKETING**

One issue to be explored later in this study is the extent to which marketing is practised as a local phenomenon in the organisations of this study. What the early research shows is that the companies featured here have diverse perceptions of what marketing is, see table one (b). These different definitions of marketing inform action

and represent the approach used by managers to its organisation and implementation. For most managers, marketing could not be defined in any abstract way outside of their own activity frame. Arguably the standard definition from the Chartered Institute of Marketing (Mercer 1996 p12), can be seen to fall within the abstract category. It is an all encompassing statement purporting to suggest that there is one way only to view marketing. It appears not to take account of different types or size of business, individual managerial perceptions, or how marketing might vary across the different organisational cultures it is practised within.

Even though a few managers did start with an acknowledgement of the Chartered Institute of Marketing definition, most went on to locate its meaning within their own organisational context. An example of this comes from Kevin Matt, who is the marketing manager of Broadsheet Lorenz, an information service for business, partly funded by the government.

"Marketing is very much like those classic statements...because of the organisation we are, we wouldn't use the word profitable, because we cannot make profits, all the money is ploughed back in...but apart from that it is all the classical sentences."

At Newfound City Council, Des Arkwright, the director of Community services and Leisure, felt that marketing was about meeting needs, but he overlayed this with a very localised interpretation as well. Again, marketing is being understood in terms of its specific organisational context.

"Marketing is always about making sure that what you are doing is what customers want and need, potential customers, and of course here again for a local authority, what do you mean by a customer? So again are you a customer if I tell you can't cut your tree down? Question. So we tend to use citizens or communities rather than customer. But it is making sure that what we do is actually what the communities, what the citizens, what the customers actually would want us to do, in the way that they would want us to do it and then making sure that they know about it."

Jerry Court is business development and marketing manager at Morris Grouts, a major building contractor in the city. He also starts from a classic definition, but quickly moves on to put forward his own interpretation, in the context of company marketing activity.

" I have found that the Chartered Institute of Marketing's definition is a good one...but this other one has come up. Marketing is a corporate attitude of mind that recognises that success comes only from delighting customers. One of the things I have tried to do is get across to everybody that they should be involved in marketing."

At Jenkins department store, when asked how marketing is defined, Roy Sands commented that,

" As far as we are concerned, it is promoting Jenkins as a brand to achieve the best sales results we can with the resource that we have available and within the sales promotional budget."

A specific organisationally focused definition of marketing is also shared by Clive Terry of Thor Engineering, the meat slicing company who said that its, " exploring the needs of manufacturers and gearing our design efforts to solve their problems."

Answering in a similar vein is Sarah Healey of Buckle Fashions. The latter company was formed in 1979, and occupies two factory spaces in the centre of Newfound. The company concentrates on the middle to better end of the market and makes handbags and related fashion accessories for some well known brand names. Sarah Healey is the designs and marketing manager and for her, marketing is defined in the context of the organisation. She points out that marketing is,

" Basically promoting our company within the market place and telling people who we are and what we do, and trying to promote our skills, the fact that we have been going for twenty years and the expertise we have, the fact that we are British."

At Nina Beauty, the question was put to Ivan Kendle, as to how he would define marketing. His company is a major manufacturer of aerosol products to own brand retailers. For him, marketing is seen solely in implementation terms. He was asked directly how he defined marketing, but responded in the following way.

" Well, we have just put new resource into the marketing area. Previously sales and marketing were one and the same thing, that means the national sales, manages their own marketing managers as well, we would have a consensus of opinion within the sales team as to what areas we needed to go after, but in the last few months we have actually appointed an Associate Director of Marketing and designated two people who were previously in the sales support team as Marketing Assistants..."



During a discussion of marketing definitions, Tucker International's Melissa Jones reflected this notion of marketing being grounded not in abstract definitions, but in the tasks she has to carry out. Asked if she accepted a classic definition of marketing, the response was as follows.

"I am a bit half and half. I do believe in classic marketing. I come from brands and to me that is very important, but...it is getting bigger and a marketer now needs to know a lot more about different areas than in the early days in a way...I think a marketer is probably the person in the business who knows most about everything, but nothing in depth, when it comes to production, finance, because we need to know how costings get done, we need to know where the product comes in, we need to know what is possible there and we need to be involved with the machinery side, with the labelling side, there is an awful lot of knowledge required."

At Mitre Technics, Gordon Willis also felt that marketing had to be defined in the context of his own organisation and not by any abstract measure. "For us it is just trying to follow the prime contracts." Mitre needs to understand each customer's individual needs and to produce tailor made products to meet very rigorous specifications. Arguably, a reliance on textbook definitions of marketing fails to capture the complex reality of doing business.

Importantly, the comments from these marketing managers illustrate the idea of indexicality, a central concept employed by ethnomethodology (Benson and Hughes 1983 pp99-127). The general idea here is that the sense of any object is derived from its context or is 'indexed' to a particular situation. Accounts, like actions, are understood by reference to a large number of unstated assumptions. The definitions of marketing presented here are, in the main, indexical. The sense that organisational members make of the term 'marketing' is derived from the setting in which they experience it. Heritage (1984 pp106-109), points out that Garfinkel argues that the sense of any action is achieved by reference to its context and this accounts for the answers given here. For organisational actors it becomes difficult to make sense of what marketing is if abstracted from its local context. A good illustration of this follows. No one is probably likely to present more of a universal definition of marketing than Guy Martin, the managing director of Media K, a marketing and design consultancy. The reverse is actually the case, as a definition is put forward that is firmly embedded in local circumstances and activity.

"...because we are in the business of selling marketing, we package it

according to the demand we perceive for it, which I believe is only good marketing in itself. So the answer to your question is, it moves, it changes."

Marketing is perceived by a number of managers to be about selling and promotion as indicated by some of the responses given above. Mary Stone of Samsons building contractors illustrates the notion of indexicality, whilst pointing out the central role in marketing of selling.

" Basically I look on marketing as selling the company to the clients or the clients agents, I mean I like to think that everyone in Newfound knows of Samsons."

Jason Hobart, Marketing Director of Stirling Publisher, suggests that key roles of marketing include research and product development but also states that it is ultimately about selling.

" Marketing in my mind is about understanding what the market wants or sub-sets of the market and designing or helping to design the right product so that you can then promote the product to the end user...you need to be involved early so you design the right product in the first place, then by all means we will promote it...marketing is at the end of the day selling, and you sell more by having the right product at the right price and knowing who the right people are to sell it to."

Robson and Rowe (1997), point out that a phenomenological study would be of great assistance in assessing the true role of selling in marketing. They postulate that a significant number of marketing academics claim that selling is actually extraneous to marketing activity. The point is further made that there is now a need for marketers to reassess the role of selling. Judging by some of the comments here from managers, selling is seen as being a highly significant aspect of marketing from the practitioner perspective and it may be possible to make a case to show it has a more wide ranging role than previously thought.

Alternatively, the importance attached to seeing marketing as strategic and as a state of mind, is pointed out by Irving Wallace, marketing director of Jenkins Print, he moves away from the emphasis placed on promotion by some of the other managers.

" I see marketing in two ways really. One that is the longer term difference between where we are going to position the business to make it successful in x period, twelve months, three years. Five years, ten years? But it is also a

philosophy, it isn't a department and marketing has to be the way a business works, because to my mind, the concept of marketing is the outward look, the customer focus, that is the main thrust."

This view of marketing as being a philosophy is supported by Paul Peters market planning manager of Earlham Newspapers, who was asked to define marketing.

" I don't know that we have got it written down in words to be honest, and I don't think I would put it down in words, but it is not a department it is more a philosophy, a strategy than anything at the end of the day."

The notion that marketing is grounded in the everyday practice of these organisations is also reflected in the words used by Robin Cawley of Nelson Universal. A local logic (Boden 1994 pp193-8) means that marketing is,

" ...the common sense behaviour of an organisation in satisfying its customer needs profitably, because I think satisfying customer needs profitably ...just doesn't really say anything, every company is trying to do that, but marketing is about the way the company actually goes about trying to do that, it is about an ethos, an approach..."

Robin Cawley's comments highlight the point that a common sense knowledge of the world is one which stresses its pragmatic nature. He seems to suggest that common sense knowledge is built up in an ad hoc fashion and is a product of a practical engagement with the world, and not with any abstract rationality. One additional clear implication here is that a universal definition of marketing cannot begin to prescribe or explain how organisational members will act in their local situations in terms of how marketing is to be implemented. Furthermore, an overarching definition of marketing fails to capture the idea that marketing is differently constituted in different business contexts, a point also made by Robin Cawley. He provides an illustration of this, in explaining the differences between large and small firms. He tells a short metaphorical story of the sea.

" Big companies tend to be quite inward looking because they are like tankers you know, moving them around takes a long time and if they go off the track they could do a lot of damage. We would prefer to be a little flotilla, but we can't be, we are a big tanker and...I am not sure whether marketing for a big company can ever be viewed as the same as marketing for a small company."

Brytting (1990), points out that for the smaller organisation, the models and theories

which are applied to the big business setting do not work. He argues that concepts taken from management theory are rejected by small firm entrepreneurs. Working from a grounded theory perspective, Brytting's study shows that small firm owner - managers operate with a range of concepts that would probably not be recognised by the large firm manager. Whilst his study is mainly about the development of organising structures in the small firm, Brytting's case studies point to the fact that the manager operates within a very personal cognitive structure. Personal goals like "having fun" (Brytting 1990 p57), are not dictated by established marketing definitions. The former lead to a range of outcomes, showing that the small firm is largely a reflection of the owners personality and goals.

The maritime metaphor used by Robin Cawley of Nelson Universals, can be helpful here in pointing out that the business 'ocean' is populated by a vast array of diverse business 'craft' many of which respond differently when being 'sailed'. As a result of size, condition, environment and the perceptions of the navigator, no two different types of ships will perform in the same way. Ships at sea have navigational and sailing equipment, enabling them to reach their destination. Business firms have marketing, which broadly performs the same function. Different ships have different types of equipment, while companies have different types of marketing. The choice of equipment and operating philosophy, taken on board to ensure proper navigation and sailing, by the 'craft' in this study, are reflective of the individual perceptions of the senior 'crew' members. Context and indexicals are all important.

### **5.3. IRON FILINGS AND MAGNETS: MARKETING AND THE MANAGEMENT OF CULTURES**

If marketing is individually defined and interpreted by the managers in this study, as reported on above, then a similar argument can be applied to the way in which cultures are constructed by those employees working in marketing. From a phenomenological perspective, people in organisations will constantly perceive reality in different ways (Silverman 1970 p188). This provides a major problem for traditional marketing planning theory, which sees culture as generally based within a systems theory framework, as does much management research (Smircich 1983). Whilst table one (c) suggests that it is only a small number of managers who view the achievement of a marketing based culture as a problem, it must be pointed out that those who feel

it is an issue, represent a significant minority. What has to be remembered is that the area of culture is closely tied up with factors associated with management power and control in an organisation (Alvesson and Wilmott 1996 pp105-8). Given this, a greater insight into the construction and perpetuation of particular organisational cultures may have been achieved if alternative views of reality had been sought from other organisational members.

The systems perspective on organisations, which the marketing planning model operates from within, views culture as a form of social binding mechanism, which holds organisations together. What is significant are contingent patterns of relationships which act as imperatives for behaviour on all organisational members. In this study, there are managers who hold to this view, seeing culture as a relatively unproblematic variable, which is central to organisational success. Typical of this view are the comments of Sheila Harris, the marketing director of Henry Armstrong which manufactures paintbrushes.

" Everyone is aware that customers are...most important, and every day we seek to exceed our customers expectations in the direction we go..."

At Vincent Duke, the financial services organisation, culture is seen as being particularly significant in terms of how the organisation operates. Mike Clark, marketing manager;

" There is an absolute minimum of the status crap...the only thing which distinguishes the guys on the board from the rest of us is the that they have an office...the rest of us sit in an open plan, pretty much alongside the call centre, and it feels basically like a bunch of like minded people working together...the cultural feeling of a lack of status, of team working, of more emphasis on what the company is for, trying to do a better deal for the customer, in a way which can still make commercial sense...there are a lot of moral crusaders amongst us..."

For a significant minority of the managers here, cultural homogeneity is not so evident, neither is it easily achieved. Rather than organisational members being driven by external forces to act in certain ways, as systems theory suggests, there is a recognition that individuals interpret and understand their experiences through subjective methods. Through this process, they construct their own views of reality. Managers need to perceive what is meaningful to other employees in particular settings (Smircich 1983). Clearly, this approach suggests that no one view of an

organisation's purpose and goals will always dominate. This point is made by Robin Cawley, of Nelson Universals, who indicates the impossibility of ensuring that everyone adheres to one particular perspective.

" I use an analogy of iron filings and a magnet. If you could run a magnet over all staff and get everyone focused on the one thing this company would be unbeatable. And any other company would be. The problem is you can't do it, you can't actually get everybody lined up behind one thing..."

Robin Cawley goes on to highlight a general problem facing many organisations as they try to implement marketing.

" ...your own people, who at the end of the day are the make or break of your company, because that is who the customer and the retailer will touch...and if they don't agree with what the company is doing?...Internal marketing is incredibly important, that is counted as almost the thing that most marketing textbooks ignore..."

Although the debate about internal marketing has been present for some considerable time, see Rafiq and Pervaiz (1993), it has not appeared as a mainstream topic in marketing textbooks, as Robin Cawley indicates. Its more central inclusion could possibly provide a means for a more interpretative view of marketing to be adopted, one not driven by conventional marketing planning systems and overarching theories like the four Ps. The focus on the latter means that marketing training and education is largely silent on issues such as differences in interpretation of marketing and marketing problems. Perhaps more fundamentally, the view that there is one right way to do marketing, provides no justification for attempts to canvas for alternative perspectives on what constitutes marketing and the resolution of marketing quandaries. This factor recognises that managers do not just control and direct, but help to shape the understanding of individuals as well (Addleson 1996).

At Nina Beauty, Ivan Kendle was asked if he tries to help build a set of common values which helps direct the organisations activities. His answer also points to the difficulty of achieving this end.

" Yes. That's right yes. How successful that is, I don't know really, because some people listen and some people don't. It is human nature isn't it...companies do have a corporate ethos if you like...and it stems from the top without question...but that is the challenge of senior management, to make sure that everybody is on board with that. It is a difficult job."

Different views on what marketing is actually trying to achieve is given voice by the words of Richard Coates, marketing manager at Everton's legal firm. He was asked if lawyers are aware of the role of marketing in the organisation.

"Some are, some aren't. Some will associate marketing with getting articles in the newspaper, taking someone out to lunch or having the odd bit of sponsorship. Others will recognise this as much more analytical and will see it as much more involved..."

For Mellisa Jones of the food processing company Tucker International, an acceptance of the role of marketing in the organisation is couched in terms of achieving internal brand awareness. She is concerned about the perspectives of factory staff. Her views reflect the concerns of the brand reality approach to marketing, where employees must be totally convinced by what the brand is trying to achieve before they can work effectively on it (Urde 1999).

"So brand perception is the one area that we are working on quite hard, we just had a two day sales conference for example where we invited all the people from the factory as well, and just did some presentations in a light hearted way all to get across how important the brand is for the company, but that's I would say the biggest area, that is not completely understood how important the brand is to the company, that is my main concern."

A similar situation appears to face Kevin Matt, marketing manager of the business advice and information service, Broadsheet Lorenz.

"...some of the operational areas are so tied into their own targets, they don't necessarily have an understanding of what we are trying to achieve..."

The notion of marketing 'understanding' might be related either to values which are antipathetic to it, or a lack of knowledge regarding what it is trying to achieve.

Both these perspectives are encapsulated by Des Arkwright of Newfound City Council.

"...an awful lot of the organisation wouldn't understand marketing at all, they think it is advertising basically, they think it is ripping people off, it's trying to pretend something isn't what it really is...I don't know how many, but a large proportion of the people who work for Newfound Council would probably see it, unfortunately."

Clearly, managers here are concerned with practical matters of how to maintain a sense of organisation and with what marketing is trying to achieve. There is a focus on trying to forge common interpretations of situations, experiences and concepts, so that coordinated action is possible. The metaphor that is used by Robin Cawley, of 'iron filings and magnets' suggests that this is a difficult task to undertake. For Alvesson and Wilmott (1996 p28), employees are unpredictable and wilful. As a consequence, the task of management becomes more than just the assimilation and application of technical skills, to one concerned with obtaining cooperation. Some of the 'iron filings' are resistant to being picked up, perhaps because of their size or shape. These may represent the divergent views of organisational members on marketing and different approaches to it. These views may only coalesce provided there is sufficient attention paid to the organisational discourse on marketing and not to structures and systems which, on their own, are unlikely to produce cooperation among employees (Addleson and Wilmott 1996 pp9-42).

At Merry and Right, a cultural problem for marketing emerges for Nick Catt, with regard to the professional values held by lawyers.

"...being lawyers...their professional life is very document driven, and nothing goes out the door without every word being checked a thousand times. Putting together a (marketing) plan can be very laborious..I have got a document that needs doing, I had better get back to my desk. All of them have to be hunters as well as gatherers...they need some skills on how to hunt. It is increasingly important. "

In the case here, the identity of organisational members is based firmly within their role as lawyers, supported and enhanced by the social and cultural framework of this profession. For Weick (1995 pp18-24), sensemaking begins with a sensemaker, where the latter is grounded in identity construction. The identities of all organisational members are constituted out of interaction, which in turn is located within the context of a particular culture. The self is socially situated and it can be argued that people learn about their identities by projecting them into an environment and seeing the consequences of this action. Individuals take the cue for their identity from others and cultures help to define self perceptions through a process of shared symbols and meanings (Smircich 1983). For all marketing managers here, culture is an important variable which is part of the fabric of their organisation, whether or not it's implementation represents a problem.



#### **5.4. BUILDING PICTURES: MANAGERS PERCEPTIONS OF THE BUSINESS ENVIRONMENT**

In the traditional approach to marketing planning, a key aspect of its methodology is concerned with the tools and techniques of environmental analysis, see for example, Speed (1994); Piercy and Lane (1996); Brownlie (1985; 1996). For Malcolm McDonald, the environmental audit represents a highly formalised process which should be adhered to, if the subsequent marketing plan is to be effective.

" The audit is a structured approach to the collection and analysis of information and data in the complex business environment and an essential prerequisite to problem solving." (McDonald 1999 p43).

During this auditing activity, there appears to be no variation in the nature of the information to be collected and analysed, or importantly, in the process to be used. The assumption seems to be that the structure of the environmental analysis is an overarching method that all organisations must use, irrespective of size or context. For McDonald (1999 pp45-6), the external audit must include an examination of economic, political, legal, technological social and competitive factors. In addition, the internal audit should concentrate on the company and its operations. The task is to screen all data for validity and relevance, in terms of the likely impact it will have on the organisation and its resources. Central to this prescriptive model is the nature of the methodology to be adopted in carrying out an environmental audit. The sequence is precise, clear and predetermined, following a range of set activities, see McDonald (1999 pp42-48); Wilson and Gilligan (1997 pp234-67); Luck Ferrell and Lucas (1989 p40). Furthermore, McDonald (1999 p44), lists an extensive range of factors to be examined, ranging from business economic environment issues to industry developments. When these are broken down, it is revealed that over twenty issues must be systematically and regularly examined and audited by all firms.

The analysis of the interviews in this study indicate that the above approach does not reflect the reality of the decision making process for organisational members working in marketing. It is not simply a question of managers being unaware of the above process either, as some marketing writers have suggested, see McDonald (1989); Simkin (1996). Most managers in this study did understand the conventional prescriptive approach to marketing planning. This should not be any surprise, given the ubiquitous presence of this approach in business texts and in management

training. With regard to the marketing managers of this study however, it is apparent that they create their own environment, not one imposed on them by marketing models. In most cases, a full environmental analysis does not take place. Furthermore, the managers do not follow the sequences that are laid out by the prescriptive approaches to marketing planning. Instead, managers audit information that is relevant to their local circumstances, using a methodology sometimes far removed from the one laid down by the rational planning model, where constant scanning and formal data collection must take place as pointed out by Mercer (1996 pp455-98). The evidence here suggests that auditing takes place, but it is more informal and much less structured than the authors of the prescriptive model suggest. See table one (d) for a summary of this.

In starting to go through the process of marketing planning, Sheila Harris of Henry Armstrong talks about the type of environmental data she collects and analyses in relation to the paint brush market.

" Yes certainly we study the competitors, so we understand what is going on there. Social, economic trends, we probably track more closely the economy, house building, the things that will directly affect our business, but change in age profile and stuff, we don't get into much to be quite honest, it is more home ownership that is important to us, home moves, house builds are critical and important to our product. We also have to stay close to what is happening in raw material terms...we have to examine other technology...we also have to track what the coating companies are doing...So those sorts of trends are more immediately important to us than whether the population is growing or declining or switching its social class...you know growth in under 16's or whatever is not going to effect us in the next five minutes or five years."

Of all the managers interviewed in this study, this represented the most complete approach to environmental analysis, in the context of what the conventional model proposes, with data being collected on a variety of factors. Despite this, a gap can be seen to exist in relation to social data. In terms of the dominant model the environmental analysis carried out by Henry Armstrong is flawed, yet for Sheila Harris, the information is appropriate in terms of her own subjective meaning system.

Sheila Harris acts on her environment by making material and technical choices involving what types of paint brush to produce and which customers to target. The process that Smircich and Stubbart (1985) call environmental enactment, shows that there exist subjective interpretations of externally situated information. Market cues

are produced, rather than pre-given environments, the perception of which changes the mental models managers work with. If certain cues in the external world are ignored, then these do not become part of a marketing managers' environment and they play no part in subsequent strategic choices. For Sheila Harris, social dimensions of the environment go largely unfeatured in her conceptual frameworks but this does not invalidate the process she uses.

Robin Cawley of Nelson Universals has a mixed view of environmental auditing.

"I think those things you said, yes, we ought to do those, but the overhead of having a team of people doing that, and the value you get out of it, relative to the value you would get by just making a fairly instant decision on where the world is, it is very difficult to square the value with the cost. So whilst we do acknowledge the fact that the political situation has an impact on our business, as does the economy, in fact very much so, the economy on claims cost, the fact that socially there are more houses with single adults living in them, technologically people are buying more high tech equipment and using it to access services for instance, we do recognise all of that, but we don't try to formalise it into 'here's a book' that tells you where the world is, because by the time you have read it, it has moved anyway."

From one perspective, it could be argued that Robin Cawley is concurring with the advocates of prescriptive environmental auditing, when he suggests that more of it ought to be done. Certainly, for authors like Wilson and Gilligan (1997 pp234-5), and Kotler (2000 p708), companies could do better if they undertook environmental auditing in the ways suggested by their literature. The issue is to what extent individual managers can, in reality, cope with the complexity of this task and if performance would really be improved by such a shift in practice. Also, in his last comment above, Robin Cawley suggests there are temporal constraints which will always inhibit total understanding. At a later point in the interview, Robin Cawley emphasised the extent to which marketing managers operate within the confines of bounded rationality, subjectively perceiving just some of the vast amount of data that exists. For him, no model can capture the complexity of the external world.

"...Things will move about, retailers will come in, go out, customers will change their buying habits, but that will be quite a slow thing...new types of car will come onto the market, others will go off the market, yes the housing stock will change gradually...the world doesn't flip on its head overnight, it is just there are a lot of things moving all at different paces, so it is seeing those things that are important to you, how fast they are moving and judging your response

given that information. But to fair, writing it all down, running it to a nice model is usually only a piece of the answer, because there is a lot more that you can't be clear about, there is no right and wrong, there is no absolute truth."

Here it could be argued that the environment appears to be seen as so changeable and chaotic, that it is pointless even trying to understand it in a temporal, structured fashion. Analysis of this type is close to a postmodernist view of marketing and society, (see Cova 1999). Guy Martin, of Media K, a marketing consultancy, also reflects the earlier point made by Robin Cawley about costs and perceived usefulness. When asked if he undertook a full environmental analysis, the response was as follows.

" No, No...I just want to know how the opposition is disposed around me, I want to know what the market generally is, and I am looking at the way in which our particular client needs are changing...it is not worth spending thousands of pounds and huge amounts of revenue trying to find out what is happening, because we are crossing a spread of very different areas. To get good enough information, it probably could be better, but the cost of it would be disproportionate."

Ardenwest is a company that manufactures packaging equipment. It is a part of a large multinational group. Gavin Ferris is the sales manager for Ardenwest and he has to share a marketing planning role with head office, the only organisation in this study where this state of affairs existed. For Gavin Ferris, the process of environmental analysis is relatively straightforward. It does not involve the detailed and formal information gathering exercise that the conventional model lays down.

" In the packaging industry it is quite easy to take a country like the UK and say, well what is a market?...So you have got the high volume system machines, then you have got the mid volume systems, mid volume stand alone machine and the low volume stand alone machine...So you have four distinct market places and then you can pick out the key customers in each of those markets areas and the key competitors. You can build up quite a comprehensive picture of what it is you want to do within the market place and the types of machine you have to produce, the price range you are aiming at and it is an on going process, it is a dynamic process which you need to keep doing."

No mention is made by Gavin Ferris of social or economic monitoring, or of any formal structured process that is used in environmental auditing. Information is restricted to competition and the market. The latter comes largely from the field sales team talking to customers and not from any analysis of formal primary or secondary data. The

metaphor of environmental analysis, used above by Gavin Ferris, as being about building pictures, captures the very individual process that is going on here and in other organisations. Unless we are children 'painting by numbers' the act of drawing is highly personalised. What we perceive and how we represent this differs markedly from individual to individual. In collecting information on the environment and thinking how to use it, the marketing managers here are building their own version of reality, their own picture, just as the artist or painter is doing when trying to understand the shape of hills or valleys. Processes and outcomes are all different.

This notion of a subjective, informal approach to environmental analysis based on what managers perceive to be suitable is reinforced by Clive Terry of Thor Engineering. He stresses the point about competitor knowledge as being central. The acquisition of this data through talk, rather than through data, also emerges.

"...In terms of direct competition, we will know more or less how many units have been sold in the UK by different suppliers, we do get to know pretty much what is happening with the service engineers visiting different people. We find out there is a tremendous amount of information out there that can be brought back..."

For David Borrows, of Leighton Jay Technical Services, which supplies computer learning materials to colleges, environmental analysis is almost seen as an irrelevancy.

"This issue doesn't really impact on us. What we do is look at market data, we will get information on school shortages and things like that..."

At Jenkins Print Irving Wallace was asked if he carried out a full environmental analysis and he too concentrated on the competitive dimension.

" No I don't, to be honest with you, perhaps I could, perhaps I should, but I don't actually go into the full demographic analysis. How is the GDP trending, how is that going to translate into print? We know we have about 6% of the web offset market, but there is no great correlation between the web offset market by itself and GDP..."

For Irving, an analysis of the business environment means an analysis of competitor activity. As with Robin Cawley of Nelson Universals, there is a recognition that a more detailed environmental auditing process would be useful, but it is not carried out. For Weick (1995 pp55-61), managers act on the plausibility principle. This means they will

not search endlessly for information, but get to know enough about the project to be able to get on with it. The emphasis on competitive information and the plausible way in which it was collected, is demonstrated in a story by Irving Wallace. Every month at Jenkins there is meeting which takes place to discuss where the company needs to be in the market, over the next few months and how it will get there. A recent move into the print market by a middle eastern investment company to take over Wyvern, a competitor of Jenkins, proved to represent a competitive opportunity. As a result of the takeover, existing customers were now wary of Wyverns new owners and their commitment to quality and service.

" The people who liked trading with Wyvern's quality, would be apprehensive so we specifically targeted those customers through some resourcing effort at those customers and I am glad to say we have just won a half a million pound account as a result of that activity. "

To use the picture building metaphor, at Irving Wallace's review meeting, a line from Wyverns new owners had been perceived and created to Jenkins, a line interpreted as an opportunity by employees. This was a process of creating meaning. The line might not have been drawn, or alternatively, it might not have been acted upon but subsequently ignored, by the marketing staff.

Irving Wallace and Robin Cawley are not the only managers who feel they could be collecting further information on the business environment. At Stirling Publisher, where many publications reach final consumers, Jason Hobart feels more information would be helpful, yet recognises it has to be a selective process, demonstrating again the importance of the plausibility principle.

" So I would hope that if you were to come back next year, I would be able to tell you we are doing more work looking at the overall business environment. At the moment we perceive the case to be that there is this huge opportunity there and our role is more to define and decide which bits of opportunity we are going to leverage, because at the end of the day everyone needs information..."

For March (1988 p432), managers are forever trapped by bounded rationality. For a number of the managers here, there is an incomplete and imperfect conception of what the environment is and the information it might reveal to the firm. This is a point borne out by the comments of Jason Hobart, marketing director at Stirling Publisher, who wants more information to be made available to him and his organisation. For

some managers, there exists a dream of rationality, where they have at their fingertips all the information ever needed to make effective strategic decisions.

Weick (1995, pp30-8) uses the word enactment to suggest that in organisational life, managers produce aspects of the environment they face. This perspective makes it clear that there is not a fixed, singular environment that exists external to the managers in this study. People are very much part of their own environment. They think and act and in so doing create material environments that represent for them opportunities and constraints. The idea that there exists some set apart, objective thing known as the 'environment' does not make much sense to the managers here, who act on a very specific and localised understanding of what it is. What is referred to as an environment and the processes used to study it, are generated by human actions and efforts (Smircich and Stubbart 1985). The character of the produced environment depends on the frameworks and affective dispositions supplied by organisational actors. Here, managers do not articulate their external business worlds in the form of an analytical models, but as stories and narratives, which draw on metaphors to illustrate understanding.

## **5.5. MAKING DIFFERENT PICTURES: THE ROLE OF MARKETING RESEARCH**

In continuation of the theme above, the traditional planning model of marketing exhorts managers to undertake extensive formal marketing research in support of strategic decision making (Tammo et al.,1996). In this context, the section here is concerned with one aspect of the organisations environment, namely customer analysis. It has been noted however by, amongst others, Greenley (1987) and Simkin (1996), that a number of marketing tools are not widely used, among them marketing research. Despite this, there have been relatively little effort to look at this area from an interpretivist perspective, in order to examine and understand marketing research decision making from the practitioner perspective (Kent 1986). As with the previous section on the business environment, there is little evidence here to suggest that the majority of managers follow the prescriptive model see table one (e). For some of the marketing managers, conventional marketing research is simply not carried out and indeed, there is antipathy to its use by a few. It would be wrong and misleading to say however, that no market research is executed by all organisations in this study. What seems to be the case is that the information which is collected varies according to the

perceptions of the marketing managers as to what is locally important. It is possible to make use of the picture building metaphor again, in order to illustrate how this subjective interpretation of the environment is about meaning making.

Sheila Harris of Henry Armstrong points out that she does do market research but that it is part of a selective, largely interpretative process. There is no mention of the dictates of general marketing theory which insists on particular types of data being collected.

" Market research we do in a multitude of ways we get competitive market information from publications, financial, trade publications...we get it from discussions with buyers, customers, competitors and users, we occasionally commission our own market research...their importance will vary depending on what it is you are trying to find out really, if you are trying to build up a picture of the market..."

Of the other companies that have a clear commitment to more formal marketing research, Buckle Fashions Sarah Healey reads trade magazines and visits trade fairs in order to analyse customers, Nina Beauty's Ivan Kendle does considerable focus group work, Des Arkwright of the Council researches local citizens views on leisure provision, Irving Wallace of Jenkins Print carries out customer satisfaction surveys and Roy Sands of Jenkins Department store does panel research, but worries about accuracy.

" Well, we do try to do a major market research about once every three years to find out what customer perceptions are, where we stand in the market place, how competitors fare against us...in recent times we have also done some panel research to make sure that what we are doing is in line with what those panels are advocating, it tends to be qualitative research rather than quantitative research, it is perhaps not always accurate..."

Also what is becoming increasingly clear is the extent to which information about markets comes through from the process of talk. This is a subjective, socially constructed dimension largely ignored by mainstream work on research, but seen as important in network approaches to marketing (Moller and Halinen 2000). The importance of talk in gathering data on the market is raised by Gavin Ferris of Ardenwest, the packaging equipment company.

" Yes, a lot of abstract data is very subjective in my view. When we talk to a customer you would talk to a project engineer, production manager, operations director, factory manager. It is all about what you need today or within the next



three years to meet the needs of your customer."

At Thor Engineering, Clive Terry was questioned as to whether his meat slicing firm carried out formal marketing research.

" No. I mean most of our customers have contracts, short term contracts from the supermarkets, from different ones, say a bacon manufacturer will be supplying one contract of one type of our bacon to say, Superstores and another type of bacon to Supremestores and another to Savastore, and these things seem to be on three and six month longevity and they are chopping and changing all the time, so yes, they can lose it, just as easily as they can gain it and therefore, it keeps the market place very buoyant, so that's how it tends to work here. We just keep our fingers on the pulse of what is happening throughout the industry, even walking through a supermarket in the evening to see what is happening on the shelves, what new names are there..."

The 'fingers on the pulse' metaphor emphasises the volatility of this market. To lose track of changes could mean losing the customer entirely, as with a nurse or doctor failing to monitor changes in a patients condition. At Leighton Jay Technical Services, which supplies computer training packages to the education market, David Borrows the marketing director, points about the practical difficulties of carrying out formal market research in his business.

" If you sell to education, it is very difficult to get out into the market place like Kelloggs, and do a market survey and say "...if you had £50,000 to spend would you buy a Rolls Royce or a Jaguar or a BMW?" Because if you ask most teachers, and you say we are developing some leading edge technology, what do you think you would like? They would like a new blackboard or another computer in the corner. It is very difficult to get, when you try and design things that you know you won't be able to bring to the market place for probably twelve months, it is very difficult to get feedback from the market place as to what they would like, it is always what they would like on that day, or within a month or so."

Tauber (1974), points out that the present structure of marketing research for new products, based on product screening techniques, reflects the assumption that the attitudes of consumers are indicative of future purchasing behaviour. These techniques might be well and good for evaluating minor, continuous innovations, but are biased against major discontinuous innovations, ones that will change our lives substantially (Tauber 1974). Whilst David Borrows company is in an organisational market, the principle of the argument can still be maintained in consumer markets as

well. Clearly, it is very difficult for teachers to be able to meaningfully discuss their need for future technology in the classroom, when they do not have much idea as to what it might be like, or to what end it could be put. The same applies to consumers who cannot really be expected to anticipate the type of products they will need in the future. Tauber (1974) postulates that major innovations and the need for them are beyond the foresight of most consumers. It is the insightful innovator who recognises the need first, a line of argument that David Borrows seems to be pursuing here.

Some of Tauber's thinking is reflected in the comments that follow. At Media K the marketing consultancy, Guy Martin was excoriating about the role of marketing research. He initially was asked if there was a difficulty in researching marketing communications activity.

" Yes there is, a nightmare. When I was a market manager at XYZ company, you went through all these appalling obscure indices, awareness and recall and all that stuff. I mean the truth is they are the last refuge of a coward. If you want to know what is going on, go and stand in a shop, watch what the sales figures are doing, that is real information...I worked with fmcg manufacturing companies and with us as an agency, you spend enormous sums of money on research, in effect trying to lay off a commercial decision onto the customer and rule one of research is you can only ask people what they have done or do, you can't ask them what they will do because the answer is always it depends....They won't make a decision for you, but people will research and research and research, until someone says, 'yes I would buy that'. One company I know routinely does things called propensity to purchase surveys, which are completely pointless. They provide the marketing department with succour, but they have no bearing whatever on commercial decisions. Indeed I would argue that some of our clients are nothing like courageous enough, it takes courage to launch a new product."

Vincent Duke is one of the leading financial service groups in the country, operating in the final consumer market. Organisational members here also have an underlying scepticism about the value of market research. Mike Clark of marketing points out that,

" I think the Vincent Duke group is not famous for using an awful lot of market research...research tends to be used more as a homing device for the really big financial decisions, a sort of validation device, rather than a 'that market looks interesting, lets go and do a load of research and see if there is an opportunity there'. We can normally spot those opportunities ourselves."

For Robin Cawley of Nelson Universal, important insights into consumer behaviour is offered up by the process of 'imagining' a customer perspective. This is extremely close to the postmodernist methodology of subjective personal introspection, espoused by some consumer researchers. It involves the researcher reflecting on and subsequently analysing his or her own personal experiences, relating to a particular consumption episode. For researchers like Brown and Reid (1997), the resulting introspections are brought together into an autobiographical essay. Irrespective of this, it again demonstrates the importance we can attach to subjective understandings of the environment which marketing managers bring to their organisational roles. Robin Cawley states that,

" We are consumers in the world as well. I think quite often in business we forget that outside of those walls we are consumers, and what motivates us? what concerns us? What are we doing in our lives? What is impacting? We just have to free that up into our business thinking, we have to recognise that's what's going on."

In the dominant perspective, most of the major textbooks, and considerable numbers of research articles on marketing and marketing planning, are based within the consumer goods sphere yet the knowledge is generalised to industrial marketing (Gummesson 1993). It is assumed that a general theory of marketing can be applied to all manner of situations. On the basis of the conversations reported above, this is not the case. There appears to be an important degree of diversity in terms of how managers perceive the role of environmental analysis and marketing research. For the industrial goods organisations, conventional approaches to marketing research do not seem very applicable at all and knowledge of markets is rooted in talk and relationships. For some, this state of affairs is well understood (Wensley 1995b; Gronroos 1994; Gummesson 1991). Whilst the fmCG organisations appear to embrace conventional marketing research a little more favourably, its use is not at all pervasive.

The picture building metaphor, first used by Gavin Ferris and then by Sheila Harris, is clearly of value here. In drawing a picture of a field or forest, the artist has to create their own version of this reality. There is no question that the field or forest does not exist, just as in the case of an organisational members environment, but it can only be given meaning through its representation by the artist. In phenomenology, a crucial value resides in returning to the self to discover the character and meaning of objects as they appear, rather than to look for one overarching objective version of reality (Moustakas 1994 pp26-27). Importantly, different artists will present their work in a

different fashion. This could be by sketch or watercolour, by more shade or less, using sharp or fuzzy lines, or through purely symbolic constructs in some cases. As with the organisation's environment which includes customers, the reality of the field or forest will be perceived and acted upon differently. There can be no pure objective understanding of it or of the business environment as prescriptive theory suggests. For the strategist - managers of the study here, imaginary artistic lines have been created between events, objects and situations, so that meaning can be made.

Prescriptive marketing planning models, in the context of outlining procedures for environmental analysis, posit individuals as functionaries of system imperatives, able to endlessly collect and analyse information. This is a seriously flawed view of the nature of people in organisations, whose actions are mediated by the way in which they individually construct reality. Brownlie and Spender (1995) argue that the marketing management literature inhabits a world view that leads us to overlook the fragmentary nature of our knowledge, where marketing managers will always have to act in partial ignorance. In this context, marketing managers are forced to use their individual judgement in determining what to look for in the external environment. Judgement then is about skills and knowledge built up in the context of their own organisation, where they have learnt how to learn about what is important to take account of in decision making, see Brownlie and Spender (1995).

As social actors, marketing managers construct their own rationality in ways that create the information differentials that will give them some form of advantage in the business environment. Managers will reinvent this rationality as events dictate, a rationality that may lie outside the logic of the conventional marketing planning framework. As a consequence, and in the case of this study, perceptions of reality are locally perceived and enacted by organisational members. To suggest that managers should undertake more formal, convergent procedures, in line with a unique view of rationality, as the conventional planning apparatus suggests, may in fact be wholly counter productive. Adoption may possibly inhibit currently successful ways of working, in much the way Saker and Speed (1992) suggest. The case is that properties adopted from the prescriptive model may not be effective, given other existent and locally determined contingencies. These could involve issues of an emergent, perhaps tacit decision making style, marketing networks, relationships and importantly, the pervasiveness of 'talk' as a decision making approach.

# TABLE ONE

A tick denotes affirmation of the theme statement by the manager.  
A black dot can denote issues of paradox, ambiguity and difference in the managers response.  
These are discussed where necessary in the chapter.

THEMES	ORGANISATIONS																						
	MT	JP	H	S	T	S	LJ	A	AR	E	T	N	B	NB	L	JD	V	BL	MG	MR	E	MK	N
Managers report that their organisations are successful a)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	●	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Managers adopt a relativist definition of marketing b)	✓	●	✓	✓	✓	✓	✓	●	●	●	✓	✓	✓	✓	●	✓	●	✓	✓	●	●	✓	✓
Managers indicate that achieving cultural homogeneity is difficult c)	●	●	●	●	●	✓	●	●	●	●	✓	✓	●	✓	●	●	●	✓	●	✓	✓	●	✓
Manager do not complete a fully structured environmental audit d)	✓	✓	✓	✓	✓	✓	✓	✓	✓	●	●	✓	✓	✓	●	✓	✓	●	✓	✓	✓	✓	✓
Formal marketing research is not a major contributor to marketing decision making e)	✓	●	●	✓	✓	✓	✓	✓	●	●	●	●	✓	✓	✓	●	✓	●	✓	✓	✓	●	●

## **CHAPTER SIX**

### **THE LOCAL LOGIC OF THE MARKETING PLAN: PROCESSES AND OUTCOMES**

## **6.1. BOXES, MATRICES AND DOGMAS: MARKETING PLANNING AS A RELIGIOUS RITE AND RITUAL**

Part of the marketing planning process involves using a range of analytical tools which can be utilised by organisations involved in marketing, see Abratt and Higgs (1994); Robinson et al., (1995); Jain (1997 pp21-40). Essentially, these tools are represented as boxes, matrices and squares. The tools can be seen as forming a major part of the belief system of marketing. Matrices mean marketing as Brown (2001 pp90-7) suggests, despite serious and continued questions being raised about their relevance and validity to practitioners, see for example Greenley and Bayus (1993); Armstrong and Brodie (1994); Meldrum (1996). Drawing on the metaphor as an explanatory tool, Brown (2001 pp50-1), likens current marketing belief to a religion, where there is one true way of understanding and organising the world. He believes that the spirit of much marketing scholarship is embedded in a supernatural like faith, a faith which espouses belief in the efficacy of the rituals associated with, for example, the doctrine of marketing planning. In this category are included 'ritualistic' tools like the Boston matrix and the directional policy matrix. This notion of an apparently 'messianic' dimension to marketing, recognised by one of the managers in this study, acts as a compelling metaphor to assist in the organisation of the material for this section.

The notion of marketing as religion is also strongly present in the work of Kent (1986; 1998); (Brown 1998a) and Robson and Rowe (1997). For Kent (1998 p139), existing knowledge of marketing is embedded in universal, religious truths. He states that marketing knowledge is,

"Embedded in faith - faith in the efficacy of its preachings; faith in the catechisms of its teachings; faith in the textbooks of marketing dogma. Through the process of guru creation and the making of a marketing mythology, concepts and principles suggested by a single author have, if they have been in tune with the times, had a remarkable tendency readily to become accepted as articles of faith... "

Table two (a) suggests that half of the marketing managers in this study make use of the analytical tools, while the others do not. The former see the tools to be of some benefit, although in the main they are viewed with a degree of circumspection, a point which cannot be captured by the table. Findings here tend to indicate that the tools provide a broad general starting point for marketing decision making and the

development of strategic thinking. This is perhaps not unexpected, as what has to be taken into account is that the tools were originally borne out of corporate strategic management (Mintzberg et al., 1998 pp24-5). On face value, this might not seem to be the case however, as an examination of any major marketing textbook, for example Dibb and Simkin et al., (2001 pp671-82), indicates that marketers have to some extent taken these tools over.

For Robin Cawley of Nelson Universals, the tools are relevant, but need to be used with some caution, as he believes they do not provide all the answers to complex marketing situations. Robin Cawley provides us with the metaphor for this section, when he points out that,

"...those principles and theories need to be understood and they need to be applied relative to everything else, but if you just religiously adopt a dogma..."

For Robin Cawley, the implications of too rigid a belief in the value of these analytical tools is apparent. He appears to see this as being similar to an excess of religious adherence, where particular teachings are pursued dogmatically and exclusively. One of the issues here is the extent to which marketing managers need to be wary of following too closely some of the strategic options that are laid down by tools like the Boston matrix, once analysis of a situation has taken place. This approach is very much evident in the work of a number of marketing writers, for example Aaker (1998 pp295-330) and Lancaster and Massingham (1996 pp18-89). Whilst it might be argued that textbooks only provide broad frameworks, it must be remembered that these books are often actually seen as manuals for practising managers.

While Brown (2001 pp91-109) has argued that textbooks embody the very essence of marketing knowledge, it should be remembered that a view has been presented that suggests the tools have significant limitations. This is in terms of their actual strategic use, see Morrison and Wensley (1991). There is also the practical difficulty of working with the models, see Greenley and Bayus (1993). A good illustration of this is provided by Robin Cawley. He points out the difficulties of working with the directional policy matrix (dpm) and what he sees as some of the inherent problems which are built into the model.

" Yes, we try dpms and dpms tend to be desperately subjective because you are putting so much of your own assumption into it, you are having to look at



your competitors in the market place, the segments of the market place and what is going to happen to them, so you are making an awful lot of assumptions of things that you believe will be true, but are not necessarily going to be true, or you might get the timing wrong. So, whilst dpms can perhaps float up areas of best opportunity, or areas of least opportunity, organisations mustn't get too fixated with the truth...you know, there is a kind of a quest for the truth here, there is no truth...so I think it is a useful input to the decision process, but it can't be the only one and that is equally true of every one of those different tools."

Here again, Robin Cawley is arguing for restraint and caution in the use of the analytical tools. For him, they are of use, but do not represent the only way to approach marketing decision making, just as evangelicalism is not the only way to approach Christianity (Wolffe 1993). The idea that the current theories and models of marketing are akin to religious dogmas and holy scriptures, can also be seen in the suggestions of Egan (1993), who points out that marketing is a discipline the prescriptions of which come tidily wrapped up in matrices, circles and squares. This can be compared to a religion that is institutionalised and ritualised, providing the practitioners of its beliefs with ready made answers. Seegar (1984), goes some way in arguing against this view, when he points out that no management model can ever be a safe substitute for common sense. It is important that the analytical marketing tools be seen in this context.

At Stirling Publisher, Jason Hobart also uses the analytical marketing tools, but he too is cautious, recognising like Robin Cawley, the limitations that the application of these models may have in different contexts.

"...we don't follow things slavishly, we certainly do question what we are doing, but at the end of the day, our business plan should be readily understood if read by anyone who has ever seen a Boston matrix or has read Porter's book...a lot of it has been borne out of American experience of course, and things are slightly different here. We are always debating the use of some of the classic approaches."

Irving Wallace of Jenkins Print also feels that the tools are of some use. For him, the tools can start a discussion, but beyond that, the local logic of his situation will determine courses of action. He makes no reference to the universalistic, overarching strategic options which the Boston matrix presents, subsequent to the allocation of products to a particular 'box' see Morrison and Wensley (1991).

" Marketing models can be a very useful way of directing your thinking, revealing gaps if you like, so if you look at the Boston matrix for example, you can realise, oh crikey, I have got no rising stars, I need to be doing something about that. So it can be a useful tool to springboard discussion, but beyond that, once you springboard the discussion, you do have to get into some more practical nitty gritty about how are we going to do that, and how does that translate into operational realities?"

Irving Wallace seems to be reflecting Doyle (1998 p115), who points out that the models should not have been thought of as just decision making tools, but as techniques enabling managers to gain insights into their businesses. Morrison and Wensley (1991) worry that the Boston Box will simply be taken off the shelf as it appears and then used unquestionably. The issue then is not so much about the tool itself; Morrison and Wensley reflect the view of the managers here when they say the Boston box is a useful way to initiate thinking, but the danger lies in the way it is perceived by those who use it. If it is viewed in subjective terms by managers as a prescriptive guide and as a decision making tool, then we are faced with the religious dogma issue.

At the paintbrush manufacturer Henry Armstrong, Sheila Harris, the marketing director, was asked about the use of the Boston matrix. Whilst this tool is not consciously drawn up, its broad framework does appear to be a general guide which helps to influence decision making at an implicit, rather than explicit level.

" The Boston matrix, in all truth, we do that by instinct...you just know that wall brushes for example it is a declining market, we won't be spending a million pounds boosting that product sector. So cash cows and all the rest of it, we instinctively know what they are, it gets drawn out in different ways. We don't plot it around a matrix as such...we don't sit and draw out a Boston matrix in truth. It is not the sort of thing we consciously sit down and draw up, we know because we know our business, which categories they are in and we make our decisions accordingly."

In this case, it could be argued that managers seem to be working with tacit knowledge. Sheila Harris is working with quite complex information, which appears personal and to some extent unspecified. It is what one knows through practice; it is knowing 'how', the latter acquired through habit and intuition (Leadbeater 2000 pp28-9). This can be differentiated from knowledge that is explicit, codifiable and transmitted in a formal and systematic way. Clearly the marketing planning tools represent the explicit dimension of knowledge. Whether they are tools to do the work

of strategy with, is open to question. For Hackley (1999), addressing the tacit dimension of practical expertise is a central issue that needs to be examined in marketing epistemology. For him, to understand this area, means to understand how strategic marketing management operates in reality.

For Paul Peters, the market planning manager of Earlham Newspapers, the question was put to him as to whether he uses the Boston matrix, product life cycle analysis and other tools like the perceptual mapping process. McDonald (1999 pp157-241), suggests that these tools form part of a marketing audit and ideally, this must be carried out on an annual basis. In practice, things do not work out like this. At Earlham Newspapers, Paul Peters use of these models is driven largely by his understanding of how they relate to the values and perceptions of other marketing staff. He does see a role for the models, but this role is strongly mediated by the local context in which he works. For Paul Peters, although a question is raised regarding 'how often' the exercise takes place, the tools do seem to be useful in terms of getting people on his staff to think about marketing strategy. Here, Paul has a story about himself and marketing planning, with Malcolm McDonald as a central character.

" I have got a marketing background and a marketing diploma, so I am familiar with the various concepts. But I went away from the industry for five years...I came back, and I was just curious as to what was the latest thinking in all of this, so I sent myself off to Cranfield and attended the five day course run by Malcolm McDonald...I thought to myself, well nothing much has changed, all the same matrix and analysis and all the rest of it...I suggested to the M.D. we should go down this route, lets follow a text book style approach to market planning, and he said yes...so we actually did the audit, we did the swot analysis...we did critical success factors, us versus the competition and all that sort of quite jazzy stuff, we did our...directional policy matrix, quite complicated that one, worked that out by hand actually...it provided quite a good focus, and I think we learnt something about the business and our strengths and weaknesses...I think it was ok to do that one year, but I think if we, as a team repeat the same process every year, I think people get bored with it quite frankly, and really the industry isn't that dynamic, doesn't change really that fast. Ok, `sits vac' revenues may be a bit more buoyant at the moment...you can take all those sorts of things into account without having to go through the whole structured process again."

Whilst by no means appearing to reject the marketing tools outright, both Hooley (1995) and Armstrong and Brodie (1994), appear to share the cautious attitude that the marketing managers of this section express. Hooley (1995), concludes from his

research that the predicted differences which are supposed to occur at each stage of the product life cycle do not materialise. Armstrong and Brodie (1994), show that the Boston matrix interferes with profit maximising. Whilst their study can be criticised as being non naturalistic, based as it is on closed experiments, the research demonstrated that the use of the Boston matrix misled decision makers. In a choice between an investment that made possible the subjects ability to double the investment and one where half the investment was lost, only thirteen percent of subjects who used the Boston matrix actually invested in the more profitable project. Furthermore, Armstrong and Brodie (1994) were unable to find a single empirical study which pointed to the Boston matrix being a valuable aid to decision making. There is however no reason to think that the Boston box cannot be used tacitly and intuitively, in the way described by Sheila Harris.

Criticisms of another key tool is made by Whittingdon (1993 pp73-5). For him, the supposed objectivity of swot analysis is questionable. He notes that perceptions of what are strengths and weaknesses vary considerably between country cultures, type of language employed, whether the latter is threatening or not and finally, varying between organisational hierarchies as well. Furthermore, the research of Hill and Westbrook (1997), suggests that the real worth of swot analysis is questionable. In their study of fifty companies, based within the manufacturing sector, they found that twenty used the technique in whole or in part. Of these twenty, swot analysis output was only used in three instances, being inputs to new mission statements. On the basis of these findings, Hill and Westbrook suggest there needs to be a 'product recall' on the swot analysis process. They argue that swot activity is not analysis, failing to go beyond general description. It is this point they argue which explains why outputs were largely not used by managers in their study.

Melissa Jones only joined Tucker International, the food processing company, six months prior to the interview. As part of her agenda she wants to make sure that the analytical planning tools, previously unused, become central in the development of strategy, The tools are,

"...coming in more and more. It has been a little bit of, ok, we have got the experience, we should know what is going on...I am a great believer in it, so I am pushing it myself as well, and the company has got no problems with it, so there are more tools coming in, to actually evaluate that what we have done is

actually the right decision, and the right way to go."

It is possible that Melissa's wish to change this state of affairs reflects her desire to raise the status of marketing in the organisation, by giving it an ideological basis and a degree of quasi scientific status. Whether or not Melissa Jones manages to achieve her stated aim, is open to question. In a similar vein, Eriksson (1999) studied marketing's relationship with other departments in a confectionery company. He noted that marketing specialists failed to make clear the relevance of textbook based marketing knowledge and failed also, to convince other managers of marketing's worth. This may be about the failings of marketing as a belief system and how its discourse is presented across the organisation.

For Brown (2001 p50), the marketing concept is inherently spiritual. It stresses becoming over being, an unending quest for customer orientation and the pursuit of general theories. This spiritual view of marketing has its attendant rites and rituals, part of which are its analytical tools. Hackley (2001b, p21) concurs with the general perspective here, when he points out that,

" Marketing's spiritual metaphors and aspirational tone betray an underlying but influential metaphysic: normative marketing management embodies a Westernised religious sense of renewal and redemption within a Manichean organisational universe of the Good (i.e. marketing orientated) and the Bad (i.e. product sales, anything but marketing orientated)."

In the present context, for managers who work with the tools, the latter can be seen as a way to reduce anxiety, provide confidence and engender feelings of control. The future is unknowable and the drawing up of a Boston matrix can be seen as a 'religious' ritual, used in a specific social situation to reduce anxiety. The construction of a box, and the overlaying of it on marketing managers organisations, can be seen as a rite, on which special powers are conferred. In this study, there is evidence to suggest that some managers believe in the ritualistic power of the marketing tools to help them look into the future, although this is a belief mixed with feelings of caution.

The tools do not control the future, but do help managers to think about it. By engaging themselves in the near religious ritual of working with the tools, the marketing managers here are concentrating their minds on relevant actions that need to be taken. The tools animate marketing managers towards what needs to be done,

rather than providing accurate ideas and answers to strategy issues and problems. Importantly, Doyle (1998 p115), makes the suggestion that the techniques discussed here should never have been thought of as decision making tools. Doyle indicates that portfolio models cannot give a perspicacious view into implementation. The managers interviewed suggest, along with Doyle, that all the tools do is to provide some insight into the balance of the business and that what really counts in decision making, is knowledge and experience of the local context. For Weick (2001 p350), plans animate individuals towards course of action and this is what these tools seem to be doing.

In this study, it was found that up to half the practising managers interviewed do not use the analytical tools of the marketing 'faith', as an aid to decision making see table two (a). This general issue of lack of use has been noted in previous research carried out on marketing planning, see for example Greenley and Bayus (1993); Greenley (1986; 1989); Verhage and Warts (1988). Arguably, what these previous studies failed to do, when reporting on the lack of use of these tools, was to try and engage with the actual concepts, practices and local logics that marketing managers do use. This clearly is an important matter that needs clarification; if the academic tools are not seen as being valuable, or as only having a limited role, what aids the marketing manager in the decision making process? To say that managers who fail to use the tools are deficient in some way (Simkin 1996), misses out on understanding how decisions are actually made in complex, multifaceted organisational and marketing environments, see O'Driscoll and Murray (1998).

An example of the thinking behind the decision not to use the tools is put forward by Mike Clark, the marketing manager of Vincent Duke, the financial services company. Mike indicates why the analytical marketing tools do not figure in his decision making agenda. For him and a significant number of other managers in this study, decisions about marketing are largely made using other approaches.

" Just thinking as individuals ourselves, what do we believe consumers would want? And because the industry is so far away from that basic understanding, the amount of science, or technique we have to apply, to do much better than what they have done, is minimal, so we haven't really had to get into too much of the little tools and mechanisms and things that the marketing academic side of things can equip you with...the fact that we haven't had to get overly analytical about it...most of us really do our marketing thinking by just imagining how we would feel as a customer, and that has given us an awful lot

of what we need to know and understand, to move the company on."

This type of thinking is clearly making some inroads into the marketing mainstream. Fifield (1998 p301) writing in what could be regarded as being a fairly standard prescriptive text, suggests that major changes are occurring in society, with institutions like the family, class and work undergoing fundamental reorientations. Under the influence of these postmodern, post industrial conditions, Fifield argues that the old marketing models, that operated according to specific rules, are less and less relevant. New, barely defined social conditions are coming to the fore. These are little understood and given this context, Fifield points out that it is time for organisations to use emotions and intuition in making decisions about service and product delivery. For some of the managers in this study, it is clear that decisions are being based on this intuitive style, rather than on rational models.

Gordon Willis of Mitre Technics was asked if he used the Boston matrix, or product life cycle analysis.

" No we don't really, the only bit we use as such is, we kind of do a review. A swot analysis...It is because our market is so narrow and distinct...we know it very precisely."

For Gordon, knowledge of markets is locally perceived and grounded. He sees no use for most of the analytical marketing tools as aids to decision making. Two other marketing managers explain why they do not use the analytical marketing tools, illustrating a key way in which many managers in this study make marketing decisions. Lewis Stuart, which manufactures small industrial machines, has Trevor Cole responsible for marketing and sales. Trevor was asked if he used tools like the Boston matrix to help plan and execute marketing strategy.

" No, in practice we probably don't. We use more initiative, conversations. We do with the AVV external overseas distributors...we say, what do you actually think about your market currently? How do you see it? Forecast what you are going to order from us, and in fact we do use their forecast within our manufacturing build programmes.

Jerry Court of Morris Grout also points to the key role of on going relationships in determining marketing actions. For him, the Boston matrix is,

"...good to talk about over the dinner table maybe, but I didn't really find there

was proper use for it. I have been with the company twenty five years, I know what we can do and I hope I can pass that out to the people in my department, and it is a matter of getting out, finding out who to talk to, going to see them, building relationships, and you do that as much by personality as Boston matrixes..."

The analytical tools can be likened to magic squares, to rites and rituals, which are cast over individual organisations. For some managers, they work. In general terms, the teachings of the 'church' of marketing do seem to provide some of the marketers in this study with some broad basic guidelines, which are of assistance in orientating managers to matters of marketing analysis. The way the tools are perceived however, means that they do not prescribe exact strategic or operational remedies for action and managers quickly move to their local environments, to intuition and to local, sometimes tacit knowledge. This latter perspective is particularly true for those managers who do not use the tools at all. For these managers, the teachings of the marketing faith in terms of the matrix and the box, are not relevant. Half the marketing managers here see the marketing tools not as a dogma to be religiously adopted, but as helpful guides. For the other half of the managers, the tools are not even valued as guides and a much more 'secular' approach is adopted.

## **6.2. MARKETING MANAGERS AND THEIR MARKETING MIXES: BEYOND THE SLAVERY OF THE FOUR Ps**

For most marketing texts on planning, another set of tools which are highly apparent, are those of the four Ps of the marketing mix (Doyle 1998 p39). In terms of delivering marketing to customers, McDonald (1999 p9) indicates that the marketing mix, based around the four Ps model, is central to the execution of an organisation's marketing strategy. This is irrespective of whether it might be a services based company, one in organisational markets, or an fmcg manufacturer. According to Waterschoot and Van den Bulte (1992), the notion of a marketing mix was introduced by Neil Borden in an address to the American Marketing Association in 1953. O'Malley and Patterson (1998), point out that Borden created the idea of the marketing mix which was based on the earlier ideas of James Culliton, who saw the marketer as a mixer of ingredients. Kent points out that it was McCarthy who invented the 'holy quadruplet' that constitutes the key aspects of the mix, namely product, price, place and promotion (Kent 1986 p146).



The conventional marketing mix of the four Ps is not without its critics. Waterschoot and Van den Bulte (1992) believe that the marketing mix scheme has important theoretical limitations and is not robust enough for academic research. They postulate that properties which are the basis for a system of classification have not been identified properly in the conventional marketing mix schema. Their question is what precisely are the constituent elements of the mix paradigm? For Waterschoot and Van den Bulte, there exists no strong classification of the marketing mix and consequently, there can be no meaningful measurement of marketing efforts and marketing effects. They note as an example, that large numbers of authors complain about the catch all nature of the sales promotion category, pointing out that it is loosely used and poorly understood.

In the context of the mix variables that can be identified, marketing is clearly taken to be a management function, where the marketer manages and manipulates a range of variables in order to satisfy customers and make a profit. In this study, there is no question that marketers do not manage a mix of variables, the issue is more about what the nature of that mix is. In practice, for the majority of organisational members featured in this study, the conventional marketing mix framework simply does not feature as a significant approach to decision making. What is evident is that the managers interviewed here have developed marketing mixes which reflect instead, individual circumstances, local environments and local markets. Table two (b) shows that few managers think in terms of the conventional four Ps framework in their marketing offering.

At Jenkins Print, Irving Wallace the marketing director, was asked if he viewed decision making in terms of the conventional marketing mix.

" We tend not to use marketing mixes, it is a fairly simplistic structure...what we look at is the product the customer requires and how that can be best delivered...`p' for project management."

Whilst Ivan Kendle of Nina Beauty is not critical of the conventional four Ps approach, he notes, in his dealings with major retailers, the importance of industry based factors. For him, pricing and packaging seem to be the crucial variables. In the self service markets that Nina Beauty supplies to, packaging perhaps provides one of the few opportunities to present the benefits of the product to customers.

"...pricing is always key because they need to protect their margin and the price in the marketplace. The packaging is even more important I guess now, and that is where I think the evolution of own label has really gone into new grounds in the last few years, where own label used to be cheap and cheerful. If you look at a lot of the products out there now, the money which is being spent on packaging formats and the design, it takes in many cases, own brand ahead of brand products."

If packaging is the key variable for Nina Beauty, at Jenkins department store it is the product offering. The latter is meshed inextricably in with decisions about the physical environment of the store. Roy Sands sales and marketing director commented that customers,

"...in the first place they are looking for product, that is the key whatever else we do, if we haven't got the right product, we will never be successful. Then you have got to produce the right environment...and that includes the whole marketing theme doesn't it, to get the Jenkins name right to get the feel right, to get the product right...."

In terms of consumer behaviour and its impact on marketing mix decisions, there is a new emphasis in consumption towards a greater concern for the role of emotions and feelings in consumer activity and more recent research is directed at the actual consumption experience. Elliott (1998) has for example, developed a model of emotion driven consumer choice. For O'Malley and Patterson (1998), the consequences of this approach means that marketing must seek to engage consumers, in order to involve them in a variety of more stimulating experiences, in much the way Roy Sands advocates. This unquestionably places a strain on the nature of the conventional mix paradigm forcing organisational members to constantly review the nature of the services they provide to consumers. As a consequence, some retail environments and consumer experiences have been changing rapidly, as Hetzel (1998) points out.

At Jenkins department store, Roy Sands draws our attention to the way in which consumer behaviour is changing in the market place with an implied challenge to the conventional marketing mix.

"I think the people who are 65 to 70 plus perhaps have been more regimented in their behaviour, and how they spend their money over the years. I think our generation has a more open mind and wants different things and more exciting things and we have got to respond to that."

In reflecting back again on the four Ps model, the current dominant marketing mix framework was developed within a particular type of environment, a consumer market which historically was suited to a standardised approach (O'Malley and Patterson 1998). In both industrial markets and services, the nature of the environments and business infrastructures are clearly different, and the conventional mix is not suitable. For example, In industrial markets, buyers are not homogeneous (Gummesson 1991). In services, there is little guidance offered by the conventional mix on how to proceed with the interactive nature of service encounters, all of which can be unique and unsuitable to the constraints of a standardised framework. O'Malley and Patterson (1998), note that one response to overcoming the limitations of the four Ps has been various attempts to use extended lists. For Gronroos (1994), this approach has not contributed significantly to the development of marketing. This is a point reflected in the comments of Nick Catt, Merry and Rights marketing manager. This organisation sells legal services.

" That's where for me, the water gets muddled, because people say there is this fifth P called people, and I sort of think well, so what's the product?...I am always mistrustful of anything that is four Ps or five Ps or six Ps or three Ss, because I always think people have come up with it because it begins with a letter. In the same way I always say never trust a list of ten, because you can probably tell that eight, nine and ten are just made up to get it to ten...."

What is worth considering here is the contribution of Dibb Simkin et al.,(2001, pp253-4). They suggest that products have three levels which need to be thought about when making marketing decisions. Within this framework, there is the core and actual product which includes not only the basic offering, but additional benefits like quality and brand name. Importantly, Nick Catt seems to be suggesting that the augmented product is of some significance here. According to Dibb and Simkin et al., (2001 pp253-4), this is the third level of the product, comprised largely of service elements expected by the consumer. For Nick Catt, although he does not use the term, this idea of the augmented product appears to represent a better, more focused way to think about the marketing offer, rather than through the construction of various larger marketing mix lists.

For Jason Hobart of Stirling Publisher, service is a key issue and again, the notion of the total product offering is raised, where it is possible to see service as an intrinsic part of it, see Levitt (1981). He indicates that promises, as part of the service element of the product, with images and appearances of symbols, assist the buyer in making

decisions on what to purchase.

"...we are trying to up the ante in terms of customer service...I guess the four Ps doesn't cover the service dimension again unless you include that as being part of the product. One thing we are very keen on here is talking about product, meaning not just physical product but also a service..."

At the other law firm in this study Evertons, Richard Coates recognises an extended marketing mix more as a pedagogical device to assist him internally in explaining what marketing is, rather than for any external strategic purposes. He was asked how the marketing mix applies to the professional services area.

" Product, place, price, people, probably. Yes, I still use it to demonstrate when I talk to people internally about marketing. It is just...slightly different if one is selling widgets, then you are dealing with a mass market in volume, and you know where your limits are, it is a fixed product. We are dealing with a yes, fixed product in terms of employment law, but the manner how people deliver that employment law advice will be according to the personality of the individual, and indeed the personality of the firm to a certain extent. Yes, there is a degree of commonality, but you have got the people touch, and that is what people buy."

Gronroos (1994) points out that the marketing mix is a list of categories of marketing variables and with any list, it does not include all elements. It certainly does not fit each situation. If we take into account the words of Richard Coates, then personality could actually be considered as an additional variable to add to existing variables. Personality may not however, be a factor significant in other areas of marketing. Certainly it would for example seem to be an unlikely factor to add to Ivan Kendle's list, at Nina Beauty. In the markets the latter manager operates in, the 'packaging' variable was noted as being central. For Irving Wallace of Jenkins Print, the 'p' of product management is seen as being important. There is no one overarching marketing mix that can be universally applied in all marketing circumstances, a point that seems to be neglected in much of the prescriptive literature on marketing planning, see McDonald (1999; p3). Instead, the research here suggests that the mix a particular marketing manager adopts will rest on personal interpretation and locally contingent factors.

Jason Hobart, the marketing director of Stirling Publisher, seems to summarise the approach that many marketing managers adopt here with regard to the use of the

conventional marketing mix and its alternatives. He points out that,

"...in the marketing plan you will not see the four Ps...it becomes a bit slavish...I would rather talk about understanding markets, understanding how you reach end users, and how understanding how you continue your business as usual, sales to those markets, how you get incremental sales to those markets, how you get loyalty, so during the year you have got a growing, loyal customer base."

Relationships are neglected by the traditional mix framework with the implications being that the four Ps are something marketers do to customers in much the way production orientated companies work, see Gronroos (1994). Furthermore, in order to achieve loyalty, a dialogue has to be established with customers, otherwise the marketer is unlikely to know what the constitutive elements of 'loyalty' are. Importantly, in terms of metaphorical understanding, Jason Hobart uses the notion of slavery to illustrate his point regarding the use of the four Ps. To be in a state of slavery, suggests that one is bound in absolute obedience to some dominating influence. Historically, we have usually regarded the situation of slavery to exist when one person, institution or state owns another completely. Whilst actual slavery rarely exists in the current western world, we can clearly identify with the implied meaning of the word. To be slavish, as Jason Hobart suggests, means that all the characteristics of a slave are present. Little opportunity exists enabling an escape, a breaking away from one central and controlling influence. What the research indicates here, is that marketing managers are in fact a considerable way removed from being in a state of slavery to the conventional marketing mix of the four Ps. Frequently, they show originality in developing their own ideas and policies regarding the type of marketing mix which should be offered to their customers.

### **6.3. 'OTHERWISE WE WOULDN'T HAVE FAMILIES AND WE WOULDN'T HAVE FRIENDS': CUSTOMER RELATIONSHIPS, QUALITY AND SERVICE IN THE MARKETING OFFER**

So if the four Ps are not the organising framework for delivery of marketing in these organisations, as the conventional planning model indicates, what is? What comes across in these interviews is not a commitment to explain marketing processes in terms of four Ps, but rather to show that there is, instead, a strong strategic and operational emphasis on quality, service, and importantly, on customer relationships,

see table two (c). This is not to suggest that the marketing managers here are unlikely to be interested in customer creation, only to point out that the majority see relationships building as central to much marketing activity. This interrelated emphasis on quality, service and relationships, is reflected in the words of Irving Wallace at Jenkins Print.

" At the end of the day, what they really want and what our stock and trade is, is high quality of product and particularly of service. As you can imagine, a lot of these jobs are very complicated and the skill in not getting them wrong is considerable, so the publishers want somebody they can rely on to handle the data, to produce their books very quickly, because obviously magazines have to be done under time constraint, catalogues also, with pricing and quality..."

Richard Coates, marketing manager of Evertons the legal services firm, explains clearly what is meant by a marketing relationship.

" The first time somebody instructs you, you can't say you have a client, they are a customer. *They come in, and the same way as you go to Tesco and buy baked beans*, you are a customer. They become a client once recurring, a repeat customer, and you move up the scale from a customer, up into a client and actually almost becoming an ally, maybe a coach, a convert. If you have a really good client that is using you all the time, they actually become part of your marketing effort and you are actually able to use them."

For some writers relationship marketing represents a paradigm shift in marketing practice, see for example Bund Jackson (1985) and Gronross (1994). The approach at it's simplest, is concerned with maintaining and enhancing customer relationships (Berry 1983). The latter laid the groundwork for much theoretical work in this area, as noted by Healy et al. (2001). Relationship marketing focuses exclusively on the buyer seller relationship. It has to be noted that other frameworks exist for analysing this general area of relationships, a significant one being network theory, which looks beyond buyers and sellers to other structures involving three or more actors (Moller and Halinen 2000).

Clearly, relationship marketing draws on the human social activity metaphor to explain what is taking place in customer firm interactions (O'Malley and Tynan 1999); (Smith and Higgins 2000). The source domain is personal dealings, where concepts like closeness, trust, respect for privacy, regularity and intensity, typically portray close relationships (Gummesson 1999 pp14-19). These are then transposed to the target

domain of business and marketing. Often, the metaphor used is of a marriage (O'Malley and Tynan 1999). In terms of this study, Nick Catt, of Merry and Right, sees relationships as fundamental aspects of life in society. When applied in a different context, they explain what his organisation is trying to offer to clients.

"...I think people are happier in a relationship than out of a relationship. There is a lot of nice warm cuddly reasons why to go to somebody that you went to six months ago, is probably better, or the fact that if you have got somebody working on something on a continuing basis, then it is easier to go back to somebody you know. We all do it, otherwise we wouldn't have friends and we wouldn't have families and we wouldn't have all those things. People are naturally gregarious and relationship driven, we like to relate to people that we have met before. So I think within that concept, clients are happier in relationships, as we lawyers are."

Richard Coates of Evertons, the marketing manager of the other legal firm in this study, indicates the importance of personal relationships in professional services.

"...the lawyer in front of somebody at the end of the day is the person that most people still buy, it is a very personal relationship and so the marketing effort is very much focused in creating the opportunities for individuals to get in front of other individuals."

At Jenkins Print, some ways in which relationship building efforts impact on customers is mentioned by Irving Wallace, the marketing director.

" Some printers discourage customers from being in the factory, we actually quite like to encourage it, and these rooms that we are sitting in here are customer rooms where people can sit in. The room behind has a television and settees and comfortable chairs...because people will be here overnight...people comment how they feel they have been brought into the business."

Mary Stone the marketing manager of Samsons building contractors, also points out the centrality of people to her organisations relationship marketing offer.

"...certain estate agents, certain contracts managers will do jobs and people will come back to us and say, I would like so and so to do my job for me, you know, if we award you this job, would you guarantee that so and so does it, and it is because they are nice, and they are good and they get to you, and you get this relationship."

David Borrows, marketing director of Leighton Jay Technical Services, talks about the importance of customer relationships and how they are built in his organisation.

" Our technical support here, you call in, you get very good support over the phone and there is no charge for it...we have found that...we can support the expense, it is a lot cheaper than running a major marketing campaign in the mass media...we can afford two sales support engineers to work in the field, and they can be of more benefit than advertising, if we can keep customers using the product and happy, then we can use them as a reference, because they talk to each other. It is a very closed community. So the relationship is very, very important."

In the financial services sector, Mike Clark of Vincent Duke sees relationships with customers as essential.

" ... we know that we don't make money from a customer coming and just buying a product we only make money if, having bought it, they stay and preferably end up buying some other ones as well in the future. "

Melissa Jones of the food processing company Tucker International, outlines how importantly retailers view relationships in the conduct of business operations. Marketing is a complex activity. Not only must Melissa forge these important relationships with suppliers, but also with end customers.

"...It is more and more the retailers saying, who do we talk to on that? They want their relationships, they want to know they are looked after, so they want one face, one name in each department that they can talk to..."

In considering quality and service as part of the marketing offer, Gummesson (1993) notes that quality is a neglected area in marketing. He indicates that it is hardly mentioned in the textbooks. When it is accounted for, it is done so indirectly in sections on marketing research and customer satisfaction. In attempting to develop a new marketing paradigm Gummesson proposes a model comprised of thirty relationships, rather than four Ps. Central to this revised model of marketing is quality and quality management Gummesson (1999 pp156-60). Quality forms an important bridge between the organisations internal operations management and an external customer focus. For Gummesson, quality is about how a company achieves the right operating processes in order to meet customer requirements.



The comments from Melissa Jones of Tucker International alerts us to the key role that quality management plays in the marketing offering of the organisations featured in this study.

" We stand for quality, that goes hand in hand with our company and with our brands, and therefore we divide ourselves from the competition in that aspect."

At Mitre Technics, Gordon Willis comments on the importance of quality and customer service, suggesting that quality is a process which permeates all his organisations activities.

" We sell to a company called Riverside...so last year we were never late on delivery, neither did we have any customer returns...by the time we sell it, we have tested the life out of it anyway...quality and delivery, that is where we are good..."

At Henry Armstrong, Sheila Harris indicates the role of quality systems and the central role of customer service. Her comments demonstrate that organisational members can also approach quality from a systems perspective, as evidenced by standards such as ISO 9000 (Meldrum 2000).

" We operate ISO 9000 systems which are fairly standard these days...And last but not least, customer service is, as far as this company is concerned, the be all and end all..."

At Thor Engineering, reliability as a feature of customer attention, and after sales service is of paramount importance. Clive Terry states that,

"...reliability, definitely, because a lot of our customers are using the machinery seven days a week...After sales service is an absolute number one as well, so many of our customers run with very little maintenance, very little engineering, so therefore they expect us to offer after sales service, so we have a manager, assistant manager and a service engineer manning telephones...so yes that is what it is basically, reliability, after sales service. Although you build a name in this market place, it is such a small industry, if you screw up somewhere, everybody will know."

Gavin Ferris of Ardenwest, the packaging equipment manufacturer, sees service as the key marketing variable in his organisation.

"I think from a customers point of view, the main element in capital equipment is customer services. If you have got very good customer services, you will win a lot of repeat business, because as I say, if the chaps in the factory buy that and it works, and it works well, it is very difficult for somebody else to come along and replace that, because this is 98% efficient. If I need spares for it, I always get them within two days, if I have any problems I have an engineer here within 24 hours, if I have any serious problems that I need urgent assistance with, I can ring Ardenwest and somebody will deal with my problem over the phone, and pass advice on to say the electronic side of things..."

At Henry Armstrong Sheila Harris points out how brands are linked to quality perceptions. In this situation, quality and service dimensions become encapsulated in brands.

" Everyone in the professional decorating trade associate the name Henry Armstrong with the very best brushes in the world and from the marketing perspective, it is such a strong brand name, it is a very valuable thing to us obviously."

An important contemporary argument in consumer marketing is that customers do not just consume products for simple material benefits, but for the symbolic meanings as portrayed in their images (Elliott 1999). For Tornroos and Ranta (1993), images are what the customer believes about the company and its brands. This belief comes from experience and observation. Brands assist the consumer in constructing the outside world and also in manufacturing a self identity (Elliott 1998). Furthermore, consumption of the symbolic meaning of products is social and is therefore reflective of the wider culture. Given this context, branding is a central aspect of marketing management, a fact recognised by some of the managers interviewed here. When brand images relate to issues of quality and service perceptions, then the significance is increased as Mike Clark of Vincent Duke indicates. He comments on the expectations of customers for the same standards of service and quality when the brand is stretched into other areas.

" Because we have got this very strong brand which people have incredibly high expectations of, we do have to be sure we can do it to a very high level and really deliver, or the thing just falls apart."

A general point of concern here is that it is easy to talk about issues of quality and service in general terms, but rather more difficult to indicate specifically what they actually mean. For Gummesson (1999 p156-60) and Meldrum (2000), the notion of

total quality management is embedded in customer perceptions of the processes and outputs within a company. What also needs to be added to this is the perceptions of organisational members, who may have differing views on the role of marketing (Eriksson 1999). It is obvious that company employees, who may be drawn from different disciplines, clearly influence what is and what is not, provided to customers. What this line of argument suggests is that any attempts at generalising on what are the exact dimensions of quality, is a task fraught with difficulty. From a phenomenological perspective, there is presented here by the marketing managers interviewed, the problem of meaning. There are diverse definitions of quality, service and of relationships and of their implementation, which are best understood not as absolute, realist structures, but as phenomenon dependent on perceived meaning.

Finally in this section, Nick Catt of Merry and Right the legal firm, draws together the three strands of relationships, quality and service which have been discussed here. For him, the three areas are seem as being inextricably linked, an issue which faces organisations in all types of markets, not just professional services, see Christopher et al.,(1991 pp3-34).

" I think the concept of relationship marketing is important if people approach it from the perspective of how do you provide somebody with a consistent high quality service to the extent that they want to come back to you time and time again, and that's the issue for law firms, for professional service firms, this issue of consistency, because our product in terms of the lawyers is not a consistent product, human beings are not consistent. If you compare us with BMW cars we are horribly inconsistent, we are different shapes, sizes, looks, we answer the telephone in different ways, we have different opinions on the same subject. So the greatest challenge that the law firm faces in terms of relationship marketing is to build that concept of a consistent delivery of service, without turning people into robots."

#### **6.4. MARKETING AS A BLACK ART: THE LOCAL LOGIC OF PLANNING PROCESSES AND PLANS**

Phenomenology is only concerned with the appearance of objects in consciousness. Consequently, the main thrust of phenomenological research is the attempt to understand experience, to describe it, in order to reach the essence of the individuals lifeworld (Kvale 1996 pp52-55). In this scheme, the researcher does not examine objects independently of the research participants. Through this process, we obtain

the participants subjective understanding of the object of experience (Giorgi 1992). In this case, the object of the research participants experience is planning processes and the written marketing plan. Consequently, the plans themselves were not examined by the researcher. A central concern of phenomenology is to ensure that accounts of experience and objects conform to the interpretations and descriptions of those being researched. Goulding (1999), points out that this is a process whereby the researchers conceptual categories are secondary to those of the participants.

According to the perceptions of interviewees, it became apparent that actual plans, incorporating the themes in the sections above, are written by the marketing managers in this study. Findings indicate however, that the plans of these managers are not driven by what the prescriptive approach indicates should be in the written documents, but by the rationality of local circumstances. For Weick (2001 pp350-2) if environments are locally constructed, then by consequence, plans must be as well. Few plans here resemble the conventional strategic model, as advanced by its advocates. This issue is summarised in table two (d). The nature of the plans conform to what can only be described as a local logic, with various approaches being adopted regarding their structure and content. Given this widespread acceptance and instigation of plan writing, there existed only one marketing manager in this study who said that there was no formal planning document. This was at Buckle Fashions. Sarah Healey the marketing and design manager, pointed out that,

" We don't prepare a document as such...we will have meetings with management and say this is where we should be aiming...perhaps we might make a report about the meeting, but we don't have a document."

In this section, a range of organisational members views are examined, reflecting the general finding that written plans are prepared but they are often differently constituted to the prescriptive approach as evident in the work of McDonald (1999, p40). An example of this variation is the plan written by Gordon Willis, the managing director of Mitre Technics. He was asked if an overall marketing plan was drawn up and what it contained.

" Yes, very detailed, yes...it is a five year marketing strategy with a three year firmer strategy...we run on a one year firm, fixed cashflow to the market type budget..It starts off with what we believe we will be able to sell...and then it breaks it down into everything, into how many people we are going to employ, how much costs are on travelling, what will be the overtime, what will be the

material content and we analyse that, and we put actuals against forecasts...we monitor all the time."

For some other organisations the marketing plan that is written down can be very simple, being no more than a sales forecast. When asked about his approach to constructing marketing plans, Trevor Cole of Lewis Stuart, which produces small industrial machines, pointed out that,

" What we have done for each of the products we have had a look and said, ok, over the next period, and we may have done that, we certainly would look at the next twelve months on a monthly basis, but we would look forward the next five years, we would actually say in total what do we believe the turnover of the products are going to be and for different products they will head in different directions."

Paul Peters of Earlham comments on the content of his plan, which suggests it does not follow the prescriptive route too closely.

" So part...will be devoted to our plans for editorial development our plans for newspaper sales and marketing, our plans for generating ad revenue through the title, our plans for brand extension...you will find that there are sections devoted to each of the major brands...the plan also talks about the service side of the business...what is our I.T. strategy...what's our human resource strategy, and so on."

Roy Sands of Jenkins department store in his answer to the question of what goes into his marketing plan, typifies the issue of local logic, understanding and action which are present in the plans of the companies in this study.

" What goes into the plan? Well I mean first of all we have a budget for the different aspects, we have an advertising budget, a promotions budget and the display people have a budget for their side of the business. We then look at the major trading periods of the year and plan those in. We have obviously the sales and the Christmas period and then we look at other aspects of merchandise, the fashion obviously, that has a spring and autumn season so the marketing of that is planned and again the household side of the business, we tend to do a spring and an autumn offensive, that kind of thing. Then we go down into the smaller details of the cosmetic house promotions, what demonstrations and activities we have in the store, but those things, the smaller things tend to get filled in once the year rolls on, and then we plan the advertising and the way we are going to promote those things in conjunction with the main themes of the year."

When Michael Marston of Archer television was asked about his approach to marketing planning, the local quality of the process came across very strongly.

" The long term plans that we do is based on the utilisation of studio, so we would look at the potential markets so that is other programme channels and set a target for the end of the year to say we hope that we would have x hours of production or x hours of utilisation of studio or post production facilities or indeed personnel, or a combination of all three."

At Newfound City Council, the Director of Leisure Services, Des Arkwright, was asked if centre managers for leisure facilities have a good degree of personal autonomy in the execution of their marketing policies and plans.

" Yes, within an overall strategy, so there is a strategic level, yes, so you don't use pictures of women with no clothes on, and whenever you advertise you will use the City Council logo...overall, we have got this 'gateway to leisure' scheme and the managers have to incorporate that in what they do, but beyond that, it is then up to them how they market their particular facilities...if they are deciding where to put an advert, that is up to them, because they are the ones that know, that if they get a return on the radio, or the Newfound Echo, or putting handouts out, or whatever, I wouldn't know that, they will know where their market is, and what is the best way of reaching them...Nigel I know, has got a marketing plan that says we will put that advert here, we will do this, we will do that, and they have set it all out, whereas for other people..."

Another good example of the inherently diverse nature of these marketing plans comes from Guy Martin, the managing director of Media K, the marketing consultancy. This company has a marketing plan that is markedly different from traditional prescriptive type plans, clearly reflecting his perception of the process and not those of any universal marketing framework. His plan is,

"...not concerned so much with 4 Ps in the way major corporations would, when they have brand custodians and all this stuff. It is more concerned with, where are we going to generate those sorts of margins and returns, what markets we need to be in, what skills do need to have, who will we be up against if we do, what is the opportunity cost of looking at various ways we may set about delivering, etc., etc. It is an unusual form of market plan..."

For the majority of the organisations here, the marketing plan was found to be an

intrinsic part of the corporate or general business plan. Given this context, differentiation still exists however. At Morris Grout, the building contractor, Jerry Court, the business development and marketing manager, pointed out that marketing planning was incorporated within the general company business plan.

" It is a general business plan that incorporates marketing and all the different divisions, plans for turnover we want in each market sector, the particular turnover we want in each market sector, what we think we are going to get, which then gives us our overall annual turnover and that is what we aim for."

For Lynch (1994), there exists an important link between marketing and strategic management. This link is displayed in the words of the marketing managers interviewed here. For Lynch, strategic management provides the framework that unifies organisational activity and marketing can serve to implement this. Marketing it is argued only operates effectively if it is rooted in a clear sense of corporate purpose and the latter, expressed through the general business plan, helps to provide this. What the corporate plan appears to do is to connect organisational expectations and capabilities with resources. The quite complex relationships that exist within strategic planning are given expression through the words of David Burrows of Leighton Jay Technical Services, who builds his marketing plan into the wider company plan.

" What we do is we have short term strategic plans, we have a long term goal, it is really sort of a five year plan and within that we created specific marketing plans for specific products."

This represents an important issue for marketing managers, whether or not they have plans for discrete products or for groups of products (McDonald 1982). David Burrows as marketing director is clear on the way he sees his plan and also that it is also about individual education products. He went on to point out that,

" At the moment we are just doing a launch on a product called 'Within Technology' which is for FE education, so I have an assistant Hayley, and I have gone through with her a marketing plan."

At Thor Engineering Clive Terry returns to a central theme. His comments show that the knowledge base in his industry varies from one organisation to another, even when fairly similar products are being made and marketed.

"...I suppose to some extent it does tend to be a black art. As I say, half a

dozen customers can be doing the same thing, manufacture the same product, but they are all doing it in a slightly different way, and their way is best..."

Sheila Harris of Henry Armstrong also feels that in her industry, the 'black arts' are practised.

"There is a section in our industry who think that making brushes is a bit more black art than science and some of our competitors probably actively encourage that, because that is the approach they take."

In other situations, to suggest in metaphorical terms that someone in an organisation practices the 'black arts' in their business strategy, might imply that generally unacceptable social practices are being carried out. It can be argued here in this context, that Clive Terry means something different by the use of the term. It is as if the knowledge about the meat slicing industry is closed largely to all but practitioners, as is the case with the black arts. Furthermore, this knowledge is not easily acquired. It is secretive, esoteric and not widely disseminated. To fully understand the codes and ways of the industry one would have to be initiated into it and learn from others, in much the way that black magic and the occult has been practised through the centuries (Bullock et al., 1988 p601). The term 'black art' acts as an explanatory metaphor here in this section, referring to the process of acquiring knowledge and learning, about not only the meat slicing industry but others in this study. Knowledge in this context is recondite and abstruse, as is the case with the occult.

This emphasis on the recondite is reflected again by Clive Terry when he mentions a marketing consultant who was brought into Thor Engineering for a period of time. The consultant clearly felt that much of the knowledge base in the company was of an abstruse nature and not easily learnt.

"Our marketing chap came in, and one of the first things he did was say, 'look there seems to be so much black art in this company, in slicing generally, I am going to put together a catalogue for a salesman to go out and ask the right questions'... but the problem with that is it varies from one factory to another."

In this section, as noted earlier, plans do exist but they also vary considerably from one organisation to another. In essence, the production of these plans can be seen as being about the practising of a black art; not in any sense to do with evil or morally corruptive outcomes, but instead, with abstruse processes which are inextricably linked to an understanding of locally contingent action. For all the organisational



members here, knowledge is rooted in practice and not in general abstract marketing theory. This idea is well captured by the words of David Burrows, the Marketing Director of Leighton Jay Technical Services.

" One of the things I have found, in bringing people to work for us, people have a got a degree in marketing, they have done the classic stuff, and they come in and create a marketing plan, and you look at it and straight off you know it is not going to work. It just doesn't relate to the market place. The people you sell to just don't need the sophistication of that sort of proposal and it is very difficult to justify some of the things they want to do, in terms of our internal budget structure."

The sources and resolution of organisational marketing issues arise as a consequence of different ways of understanding. This perspective recognises the diverse and contingent nature of organisational life. The conventional truths of traditional marketing planning cannot be taken for granted as operating in practice. Here in this study, the evidence seems to indicate that there exist no marketing models from the prescriptive approach which are held to be absolutely essential for practice. Managers interviewed here unwittingly reflect an ethnomethodological emphasis, which is on the practical and the local, rather than on the abstract and the general (Hassard 1990). Ethnomethodology as a theoretical device to be drawn on, proposes that the meaning of artefacts and actions are only available through what is conceptualised as the 'indexicality of particulars' (Boden 1994 p35). Here, meaning is constituted in, and by, the interaction of individuals and objects within the concrete conditions of a particular setting. The case is that organisations are unavoidably local phenomenon. Working and thinking reflexively from within, individuals see institutions as particular phenomenon, resistant to generalisations.

The fact that managers do not use the prescriptive approach does not mean that these firms are unsuccessful or lacking in some way, as some mainstream marketing theorists might suggest. The plans that are written are based on a knowledge that comes from a practical engagement with reality. These plans work for the managers here, even though they know that their structure is different to that of the conventional planning model. In the next few sections of the following chapter, some alternative approaches to marketing planning decision making are examined. Importantly, the main purpose and real value of the last section in this chapter is not in describing actual marketing plans, but in showing that they are first and foremost reflective of managers perceptions of local contexts and priorities, where knowledge is

a contingent, tacit commodity. This is a point well emphasised by Brown when he states that,

" Perhaps the most incredible thing of all, however, is that the promulgators of marketing planning place so little store by what is clearly a complex, convoluted and context dependent process." (Brown 2001 p113)

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## **CHAPTER SEVEN**

### **PHENOMENOLOGY AND STRATEGY: DECISION MAKING AND THE MARKETING MANAGER**

## **7.1. ARMIES, HILLS AND BATTLES: MARKETING STRATEGY DISCOVERED THROUGH ACTION**

Firstly it is important to give some thought to what is meant by the term strategy, as it has implications for later analysis. In a prescriptive marketing context, objectives and strategies are unsurprisingly, taken to relate to markets and products, see McDonald (1999 p49); Wilson and Gilligan (1997 p270); Westward (1996 pp5-24). All authors agree here that strategies are best developed after a product portfolio analysis has taken place. In this study, whilst it has been found that some marketing managers have used some of these portfolio tools, it is much less clear how the information gleaned from the analysis translates into later 'strategy.' A further problem is that due to the proliferation of definitions, it is difficult to see precisely what is meant by the word strategy anyway, as Hackley (2001a p138) indicates. Weick (2001 p345), is largely in accord with this view. Alvesson and Wilmott (1996 p133) indicate that there is a great deal of strategy talk in business. They note that the meaning of the term strategy is a loose one, both in theory and practice. It is often used they believe, just to simply indicate that decisions are big and important.

In the prescriptive marketing literature, it is clear that differences of interpretation and emphasis exist. For McDonald (1999 pp49-50), strategies follow objectives and are about the four Ps, while for Lancaster and Massingham (1996 pp12-33), strategies are about ways of building, holding, harvesting and divesting products. Jain (1997 pp21-40), favours defining marketing strategy as the organisations endeavour to differentiate itself from competitors. For Piercy (1997 pp141-2), strategy is about breaking free from established marketing practices and finding a pathway which involves market choices, value propositions and establishing key relationships. Piercy suggests that marketing strategy should be revolutionary, about moving away from industry dogma, tools and rules, all of which he argues can inhibit success. Clearly, all the different approaches considered here means that to delineate between strategy and tactics may be seen as problematic. This is a distinction that numerous marketing authorities think it is necessary to make however, see for example Kotler (2000 p64). From Piercy's viewpoint, it could be argued that this delimitation is a hindrance, as it is about what he considers to be discredited old rules and dogmas.

Within the context of a relativist view of knowledge, which is the perspective adopted by this research, it is argued that definitions should not be imposed on actors (Bryman 1988 p61). A consequence of this is that it might be useful to operate with a broad view as to the meaning of the term 'strategy.' Given this, Burgelman's (1983) definition

of it as a theory about the reasons as to why a firm is successful, provides us with a reference point for understanding how managers actually get things done, in the context of their perceptions and experiences of organisations. Furthermore, if we adopt Burgelman's approach to thinking about strategy, then the marketing managers in this study are likely to be able to provide us with important insights into what are successful marketing decision making processes.

For the marketing managers in this study, strategic decision making comes not out of grand rational linear processes, but from activity embedded in day to day action. The classic sequence of formulation, followed by implementation, does not appear to apply. Mintzberg (1987) suggests, in metaphorical terms, that the strategist is a 'craftsperson'. The latter is very closely involved with the materials of the trade. Clay is shaped and transformed and imperfections in outcome might mean that changes are made to the clay. This reasoning is applied to the strategy and decision making process. Mintzberg (1987), argues that business is too complex and full of unexpected changes for the manager to be able to predict the future effectively. Strategists must retain the closeness, the sensitivity and the flexibility of a craftsperson. In this way, the process of crafting strategy becomes continuous and highly adaptive, with formation and implementation being very closely linked. For the managers of this study, it is clear that for many of them, strategy emerges out of this type of process. Table three (a) highlights these interview findings.

To preface the comments of the marketing managers here in this section, it is likely that Mintzberg (1987), would characterise many of the approaches they use as emergent strategies. Strategies he suggests, grow like weeds, taking root in all kinds of places, wherever people who are in touch, have the ability and capacity to learn. This is known as the 'grassroots' approach to strategy (Mintzberg et al.,1998 p196). To start with, like weeds, strategies grow in all kinds of unusual places. Clearly, like weeds, some strategies may need to be uprooted immediately, as they may go in directions the organisation is unable to deal with. The unexpected should not be cut out too soon however, as it might grow into something worthwhile. Mintzberg (1987), points out that managers who craft emergent strategies are involved and responsive. They try to learn about not only their organisation, but their industry as well. Experience becomes all important, to the craftsman- strategist. For Mintzberg, any managers who have to rely on formal planning mechanisms alone, in order to create strategies, will by implication, lack any intimate knowledge of their business.

In discussing their approaches to making marketing decisions, it becomes clear that

the managers interviewed here do not follow clearly delineated planning procedures when implementing strategy, as advocated by the classical, rational model. Taking up an opportunity as it presents itself, cannot by definition, be planned in advance. At Thor Engineering, Clive Terry comments on the way in which he has to respond to the immediate needs of his customers, with the implication that any written strategic plans are not adhered to in any rigid fashion.

"...we try to do quarterly planning up front...we plan for three months, where we are building so many standard machines of different types per month, and we will chop and change that as we need to, and will modify machines as we need to, to try to be as flexible as possible...customers come in with ideas, and they say, we want to do this, we want to do that, and we will try and push something together, and then engineering have to come up with it..."

Reflecting the experiences of Clive Terry, is Lewis Stuart's Trevor Cole, who also operates in a business to business market. He outlines the fact that decision making is based on the need to respond to customers current situations. "A lot of what we have done is tended to be reactive towards our customers current situation...."

It is clear that at Nina Beauty, the traditional linear model is not applicable. Ivan Kendle points out that decisions are made in present time.

"We have had a very condensed decision making process and decisions are taken quickly on rough cuts of financial data. If we need to make capital expenditure, we assess the market size, what we think we are going to get from it what we need to spend, and a decision in principle is made very quickly. You need to do that because we operate in so many different markets. As well, if we hesitate and wait, then it is gone and we have missed out...If you think that within the personal care area in particular, the product life cycle of many products is maybe two years at the most, before they have evolved and moved on, so if you don't decide very quickly to go into something, if you go through a long protracted decision making process, the market is already on decline and into another area, before you have got your product out yet."

For Richard Coates of the legal services firm Evertons, events emerge which mean that other activities, which have been planned for, become of secondary importance.

"There is a degree of reacting to opportunities yes, Nelson Universals suddenly ask us to pitch for their work. A lot of resources here. When you are into that effort, other things have to take a back seat to some extent..."

At Archer Television Michael Marston indicates how plans can be quickly overturned in

order to take advantage of an improved commercial situation.

" If someone came to us now and said, we are desperate for a studio for two weeks starting tomorrow, we would move hell and high water to do something in the studio, because at the moment the studio that we can charge out for £5,000 a day is being used for a PR exercise. Now, I would have the fallout from the PR disaster of cancelling the presentations we are doing next week, and the week after, but I know from a commercial point of view, it would be very silly to turn down fourteen days work at a minimum of £5,000 a day."

Michael Marston also points out the unpredictability of markets, a factor which is very difficult to plan for.

" You never know quite what is going to take off, what will happen next. We had a series on Sunday evenings called 'Home is Where My Love Is' which, this Sunday got a 51% share of the audience, which is very unusual in this day and age, with the number of channels, and ITV love it, the audience love it...Now, if you had sat down and said to the Commissioner for Programmes at Network Centre we have got this nice little story...I mean you wouldn't have thought that it would capture the imagination as it has done... "

At Leighton Jay Technical Services, products are developed and then placed into 'test markets', which help to provide evidence for existing and future customers on the applicability and appropriateness of the products they are interested in purchasing. David Borrows, marketing director, comments on this process.

" ...You have to kind of go a head, take a chance if you like, gamble, do the development create the product, bring it to the point where you can sell it, and then market the hell out of it and sell it...yes, it is test marketing...If you try doing it the other way, it is very expensive and very difficult to do, trying to go out, create a marketing plan, because what happens in education is people always want to know who else is using it, or does it work, has it worked..."

At Jenkins Department Store Roy Sands shows that his marketing approach is also flexible, particularly in terms of competitive response.

" You have to respond to competitors from time to time. I mean you try and stand firm with what you are doing, but if somebody comes in and knocks you hard, then you have obviously got to respond to that, you do have to be fluid in reacting..."

Nick Catt of the legal firm Merry and Right, also shows that his approach to marketing strategy is fluid and flexible enough to take account of any opportunities that might



unexpectedly arise.

"...the concept of what people call the 'passing bird' I think it is the most usual phase in terms of oh, here comes an opportunity, is often used quite rightly in terms of here is something that might drop into somebody's lap..."

At Buckle Fashions, Sarah Healey suggests that marketing has to proceed in an incremental fashion, where future business is not obtained and encapsulated in long term master plans but by a gradual process of making the company better known. The future appears largely unknowable, and is not referred to in the context of any written plan.

" All we need is four or five major accounts that give us very good business...I am going obviously for those accounts...I am looking at just getting our name known in the market place...it will be nice to start turning people away and just be known for what we do, and if necessary we might expand if things go well."

Guy Martin, managing director of the marketing consultancy Media K, possibly speaks for many organisational members when he states that, " you tend to deal with where you are now, and say how can I get 5% more for 5% less and all that."

Guy Martin goes on to suggest there is an element of retrospect to decision making, coupled with another of Weick's notions, that of the 'ongoing' nature of things, (Weick 1995 pp43-9), where people are always in the middle of something.

" If you are wandering along with your army, fighting your battles and all that, at some point you have got to go over the next hill and see what is there and look back and see how you are."

It can be argued that strategic opportunities cannot be preplanned, only assessed when they arrive and this is done on the basis of past experience. Life is lived on the basis of looking forward but is understood only in the context of the past. Weick (1995 pp24-30), argues that management is closely concerned with the process of imposing sense on past experiences. Strategy is discovered in action, rather than through predetermined plans. As Guy Martin is suggesting, managers try things, look back at the consequences, explain them and then continue on with the 'battle'. Central to this process is interpreting the business environment and organisational members understanding of it, as a locally perceived phenomenon. Often, armies can choose their environments. They can decide where to engage the enemy and this will often constrain future actions in some way. We are presented here with an insightful

metaphor which helps to provide us with a way to view the basis of much decision making. Only by looking at the 'armies' past and present actions can any sense be made of what to do now and in the future. The case is the same for the marketing strategist, who must decide whether or not the opportunities which are immediately presented, are worthwhile pursuing.

Successful past engagements with the 'enemy' may lead to a major assault on their key citadel, or conversely, lost battles in the past may lead to a defensive withdrawal and perhaps a new campaign elsewhere. Managers are finding out and selecting what works, when sense is made of actions in a retrospective manner. Without this element of retrospect, there would exist no basis for understanding, no basis for decision making, apart from a brief written plan and as Shaw et al., (1998) note, this captures little of the reality which people in organisations face. The idea of retrospect also places the individual manager at the centre of decision making, in line with a phenomenological understanding. On an added point, without the notion of retrospect, the emergent strategy process might just suggest that unintended order exists in an organisation, with strategies sprouting everywhere. These strategies can appear as if driven by external forces, rather than through actors conscious thoughts. With the inclusion of retrospect, as part of an explanatory framework, individuals become firmly placed back in the centre of organisational action and meaning, as reflective, learning beings.

## **7.2. GETTING THEM ON BOARD: CUSTOMER RELATIONSHIPS AND MARKETING DECISION MAKING**

For the organisations of this study, relationships and networks are central to the emergent decision making process, as indicated by table three (b). It is out of these on going activities, that marketing decisions are made. The rational analytical domain of marketing is not central to the process of decision making. Knowledge of markets and strategic operations are based in local talk and local relationships. At Buckle Fashions, Sarah Healey points out the principal role of talk and experience in the marketing process, in her relationships with staff from the retail chains she deals with.

" It is about being able to talk about leathers and fittings, because if people come back to you and say who have you made for, and where do you get your leathers from, and where do you get your fabrics from, there has to be general

knowledge about the product really, which just comes from working there and experience."

At Morris Grout's the building contractors, Jerry Court was asked his views on the importance of relationships.

" Well, I think that is what our business is all about, and there is all these clever things put about, but we all know it is more expensive to get a new client than it is to hang on to the old one. That goes all the way through any business I would have thought...We are into building up long term relationships with clients for repeat business..."

At Mitre Technics it is almost impossible just to base marketing on a simple general planning model, as each customer has to be dealt with individually. Relationships span documents and they also span years. Gordon Willis indicates that,

"...everything is sold to a different specification to every customer...a lot of long term contracts and you have to write very detailed customer plans and quality plans for a contract...we are currently writing contracts now, that will run for another eight or ten years...there is a tremendous amount of up front role."

Nina Beauty's Ivan Kendle, who distributes aerosol products to major supermarkets, discusses how important it is in fmcg retailing for the latter to build good lasting relationships with their suppliers. He notes that a supermarket will be,

" ...looking for those small points of difference, small profit gains or efficiency gains, which will actually make the difference between them and their competitors, and you can only achieve that if you have got your suppliers working with you...its different for us...we don't construct a classical marketing plan...a lot of the marketing initiative is with them."

At Samsons building contractors, Mary Stone the marketing manager, also postulates that the conventional marketing tools do not really capture reality. "...this is it, we do live in the real world. And with the best will in the world, all these sorts of things are not going to bring you work, at the end of the day they really aren't..." Networks and relationships form the basis of marketing decisions and these for Mary Stone, include the competition. This suggests that increasingly, the old model of a discrete business organisation surrounded by carefully delineated customer and competitor groupings, is seen as a less relevant way of characterising the current complex state of the business world (Egan 1995 pp66-75). Mary Stone has a short tale to tell about the competition

in her industry.

" So really there is only just a hard core of just six or eight companies within this area who are actually competing for the jobs, and funnily enough, it is quite friendly because you get to meet them at the various functions, it is very friendly, kind of...most of the companies are very good. If a tender enquiry comes in to us that really isn't our cup of tea, or we are just too busy, we will say, and give somebody else the opportunity."

For Gilmore et al. (2001), networks are an important way in which marketing decisions are made. Whilst their particular study is about small and medium sized business organisations, much of what they have to say on the topic also relates to the larger organisations in this study. They suggest that SMEs do not conform to the conventional characteristics of marketing textbook theories. Their study indicates that SME marketing decision making is built around spontaneity, reactivity, informality and looseness. Central to the decision making process are personal contact and social networks, (Gilmore et al., 2001).

Marketing by networking means that decision making is realised through people orientated, relationship activities, which take place during business and trade meetings. As with Mary Stone, Gilmore's study found that there was not only networks between suppliers and customers, but that there was considerable communication between competitors as well. For Gilmore, much network development can be attributed to the increased experiential knowledge of the marketer. Networks emerge then, as an important part of an organisations marketing infrastructure. As a result of the interviews carried out with the managers of this study, which also include some large organisations, there is no reason to suggest that networks are not a major way in which marketing decisions are made in all types of business.

A number of the managers interviewed here talk about the importance of key account management, which can be seen within the broad context of marketing through networks. For McDonald et al., (2000 pp31-5), effective key account management is a vital skill that marketing managers need to possess. In a rapidly changing business environment, there has resulted a dependency on an organisations supply chain, to assist in the process of gaining competitive advantage (Christopher 1997 pp22-3). For Webster (1992), the emerging marketing organisation is a networked one, where partners become central to the organisations operations. For the Nordic School of marketing, (Gronroos 1994), relationship building and management is a vital aspect of

business. The implications of this approach, with the emphasis on constant supplier customer interaction is that decision making must be an on going process, the complexity of which can not be captured and contained in a written linear plan. At Henry Armstrong, Sheila Harris the marketing director, places relationships and marketing decision making very firmly in the context of an on going, key account management process.

" How do we go about making sales and marketing decisions? Probably one of the main things we do in that respect is down to key account management...Key account management, where we...basically keep very close to our customers, understanding what they need...it is critical and we actually track that very closely, the degree of contact that we have with our customers and the breadth of contact, we don't leave it just to our salesmen. Our MD has contact, I have contact, our production director has contact, the finance director has contact, so that we have a very broad spread of contact amongst our major customers, so that is all critical really. I guess it is the age old debate about whether sales and marketing should be combined. In our organisation it is combined."

Key accounts are also highly significant for Melissa Jones, of Tucker International.

" ...it is the retailer who requires one particular team to work on their accounts...some of them are extremely focused and know exactly what they want themselves, and we just have to help them get what they want. Others...they haven't got a clue what is going on, and rely very heavily on us to support them."

For Ivan Kendle of Nina Beauty, key accounts are also very important in his dealings with the retail chains.

"...we have two teams of national account managers and there are two other national account managers working for me, looking after the contract side of the business, and then there are now five national account managers working, reporting directly to the Sales Director, on the retail side. And the reason for the difference in numbers, is that the UK retail is far more demanding in terms of the level of information and detail and everything else that they need."

Gavin Ferris of Ardenwest, which produces packaging equipment, speaks for a number of the managers here when he states that,

" I look at a lot of accounts on account management basis...so there is a lot of account management that goes on, which is essential if you want to get repeat

business."

People in organisations find themselves 'thrown' into situations. The world is on going and dynamic. If an organisation has a multiplicity of relationships, there is then a constant stream of problems choices and solutions which need to be faced. As Weick (1995 p43) points out, we can adapt the idea of the hermeneutic circle to activity in organisations. This highly insightful perspective indicates that decision making does not start and end with formal planning. Organisational members are always in the middle of complex things, which they are constantly trying to disentangle. The latter leads to a situation where decisions are constantly being made in a state of 'thrownness' (Weick 1995, p45), In these circumstances, people have to deal with whatever comes up and the effects of action cannot be predicted. This notion of continuous decision making is made by Irving Wallace. At Jenkins Print where he is marketing director, relationships are central to the way in which business decision making is carried out.

"...we have to advise and take our customers in the directions that they need to be going, so we advise them on what print can deliver for them, what benefits print can give them...so we are advising and taking our customers onwards all the time...it is very much communications consultancy..."

Irving Wallace goes on to comment about the nature of these customer relationship decision making processes.

" We have some very long term relationships. This is 'Excellent Home' magazine, we have printed that for twenty eight years. MR Components which is one of the main electronic component companies in the UK, we have printed their catalogue for a similar length of time, twenty seven years. They are very long, well established business relationships, and we know exactly what they want and they know exactly what we do and we also work together, I mean some of the areas have been co-defined between us and these companies."

Clive Terry of Thor Engineering also points out the importance of relationships. He goes on to tell the story of Thor Engineering within the network which is the food processing industry.

" Some customers we have a very good relationship with...some of the customers we don't just sell them pieces of machinery, we actually go in and help them ...before the product gets to our equipment. We will advise them on different ways of doing things, different types of ingredients...we do try to offer

them a complete solution, even though we are not necessarily supplying all of the equipment. We go in depth, we find it does help. We find the more we can help them, the more they will come back to us and talk to us, and become more confident in maintaining good relations...We man the phones before 8 o'clock in the morning and usually until 6.30 at night, we provide weekend cover, the customers requested it, especially at bank holidays...I mean we are not just an engineering company, on a five day week, nine till five, we are basically part of the food processing industry as a support to them."

For Broadsheet Lorenz, the business information service, much of what they do is predicated on networks. Kevin Matt comments that,

" There is a lot...of links with the media, we spend a lot of time working with the media here...there is a lot of links with local councils, who we work with very closely towards developing economic prosperity...we work very closely with the economic development department...and there are a lot of other partner organisations like...enterprise agencies, tourism agencies..."

In the world of television programme making, relationships and networks are important in helping to identify decisions on products that can be made and marketed. Michael Marston;

"...within the broadcasting world and the channels most people have worked for one station or another, or people have moved from one area to another and it is not 'old boys' that would be the wrong expression, but within the buying circle, most people would know of someone who knows somebody within the area that you are looking for, so you really need to keep your ear...to the ground...you hear that channel Y are looking for a new series..."

For Ellis and Meyer (2000), much of the strategy process in industrial supply chains is driven by complex relationships and networks. For Healy et al., (2001), network theory emerged from early work in which the notion of discrete transactions was questioned. From the relationship marketing perspective, network theory developed when researchers started to look at the complex structure of networks which can involve many actors. Network theory has been a significant in the Nordic School of marketing see Gronroos (1994); Gummesson (1991). In this perspective, decision making is based on ideas and importantly, negotiations from many different units. Networks are gradually built around a long term interactive relationship and for Gummesson (1991), the marketing 'game' is played daily. The implications of this approach are that marketing decision making is continuous, fragmented and based around on going perceptions of reality, rather than in long term linear plans.

At Nelson Universals, Robin Cawley sees it as very important that he establishes a relationship not only with end customers who purchase insurance, but also with the intermediary retailer brokers. This not only shows the complex nature of reality for marketing managers, but in using a metaphor Robin Cawley helps to provide a framework for understanding relationships and decision making.

"...we don't get the customers unless the retailer recommends us...you have got to have the retailer on board. If you can get the retailer on board, then the customer who comes to the retailer will receive a recommendation to be with Nelson Universal...As a marketing man, the end customer has got to be the person you are focusing on, but if we only focus on the end customer, we are going to have a situation and we have proved this, where people walk into a retailers premises and say, I would like Nelson Universal's whatever insurance policy please. And the retailer says no, no, no, you don't want that one, you want this one from Accident Express...or somebody else...now the customer...they are not about to throw that advice away, that is exactly why they are there...we...have to be clear that we have got the retailer recommending us."

The metaphor used here, to get 'the retailer on board', is suggestive of a journey. It could be an expedition by sea which requires certain expertise from the crew. Hampden - Turner (1994 pp15-66), uses a range of sea going metaphors in his study of managers and corporate strategy. One manager talks about having to chart a course between Scylla and Charybdis, between the rock and the whirlpool. For this journey to be completed successfully, particular skills are required by those navigating and manning the ship. It is essential that the appropriate people are recruited. For Robin Cawley and for many marketing managers here, the participants in networks and relationships are vital crew members who help to keep the organisation on an even keel in turbulent business waters. Without these crew members who assist the captain in making decisions, on an on going basis, the ship would quickly run aground, or worse. The sea as the difficult business world, the ship as the organisation and on board crew members, constantly acting and making decisions, is a strong metaphor which shows up the likeness of unlike categories. The metaphor used here aptly captures the complexity of this section, with its emphasis on relationships, networks and the on going nature of decision making.



### **7.3. GETTING INTO OTHER PEOPLES SHOES: MARKETING DECISION MAKING THROUGH TALK**

Relationships and decision making cannot be considered devoid of a discussion of talk. As Weick (1995 p41) notes, those who study sensemaking pay a great deal of attention to talk, discourse and conversation, because that is how a large part of social contact is mediated. Talk becomes the work and organisations are places of interpretation and argumentation. People create scaled down problem environments that make possible collaboration and build commitment. We can see marketing relationships networks and strategy from this perspective. In business settings, individuals rarely act alone. Table three (c) shows that much decision making is based in and on talk.

Managers are portrayed by Grint (1995 pp45-67) as fire-fighters, where in the course of their work, they are constantly having to attend to emergency situations. Grint goes on to suggest that what managers do is to linguistically asphyxiate these fires, where they become suffocated by words. Management is about talk. For a significant number of the organisations here, one of the ways in which strategy is discovered in action, is through this process. Decisions emerge out of negotiations, rather than out of formal predetermined procedures. Talk is a pervasive aspect of organisational activity and is a neglected sphere in much marketing literature. Hales (1986), notes that much management activity consists of face to face verbal communication. At Thor Engineering, the meat slicing equipment manufacturer, decisions come from talk between the former and their customers. Clive Terry;

" The marketing is generally pushed by the supermarket groups, wanting to do something, who say to our customers, I need this pack of meat in fixed number of slices, fixed weight, I need it shaved, this pack size, this orientation. Then those suppliers will come to us and say, basically down the line, this is what we need to do, what can you do for us? Then it is basically trialling machinery, developing equipment, to give them what they have got to supply to the supermarkets."

Clive Terry goes on to say that,

" We are always in contact with our customers. I would not go more than a month without talking to any of our customers direct...you are constantly talking to them."

Melissa Jones of Tucker International points out that talk is central to her role as a marketing manager. Her comments also point to the fact that the way in which traditional theories of the way managers spend their time is flawed. Hales (1986), indicates that managers have considerable autonomy in deciding what to do with their time. The management task becomes located within a concept of social time, which is based on interactions with staff through talk. The way Melissa uses her time by 'giving away' five minutes here and a minute there, for talk with staff, informs her identity as a manager. For Knights and Odih (1999, p130), temporal realities are presented as defining an individuals self identity.

"...my biggest task is people, and I don't see anything wrong with that as such, but it can get too much, because I have quite a few people reporting directly in to me and it is like, have you got a minute, have you got five minutes, and you find some days all you do is talk to the people, rather than being able to sit down yourself and do some strategic tunnel vision work."

At the building contractors Samsons, Mary Stone, the marketing manager, uses an interesting metaphor to try and capture the role that she sees talk has in the business. As part of a comment about talk, she mentions putting herself "in other peoples shoes", taking us to a central aspect of relationships and the role of talk within them. In personal and business relationships, Gummesson (1999 pp15-6), notes that general properties of such an undertaking revolve around issues of collaboration and trust, among other things. This involves having a mutual understanding of what the other party requires in a relationship, and it has to be understood if the latter is to prosper. Guiding Mary Stone through her talk activity, is the principle of reciprocity. She has to empathise with significant others in her network and understand what they require. This is achieved through the process of talk and without the mutual understanding which accompanies it, decisions would be very difficult to make.

"You know, we always try to be very nice to people, because you never know what you might need yourself. I mean, I have to speak to people and try and get work from people, so I always put myself in other people's shoes..."

Boden (1994 p207) points out that in organisations actors are always adjusting their actions to those of others. Reciprocity is a central feature of organisational life, which is interactional and sequential. Reciprocity, this getting into other peoples shoes, is a recurrent and recursive feature of social action. This means that managers are constantly trying to fit their agendas and time frames into those of others, both in

and out of the organisation. This leads inevitably to a process of mutual adjustment. Decision making occurs as a result of everyday exchanges facilitated through talk. Together, people in the networks discussed here, discover what is and what is not possible and this is realised principally through the process of talk, where,

"...a tense and tightly organised reciprocity of perspectives occurs." (Boden 1994 p207).

David Borrows at Leighton Jay Technical Services was asked if a lot of decisions about new training software was based on talking to people.

"Yes. Basically a lot of our information comes from, in colleges, the fact that we have been involved in education, so we talk to lots of people..."

For Des Arkwright of Newfound City Council, talk is intrinsic to his work.

"Mainly it is talking, I do a lot of that anyway, I suppose. Mainly for me it is internally and externally, there are an awful lot of meetings for example with members, colleagues, with employers. So an awful lot of talking internally, with various people and an awful lot with partners, potential partners and again I mean last week we had a company come down from Scotland who would like to build facilities, maybe in some of our parks, and there was a lot of talking to them...quite a bit of talking to communities..."

At Mitre Technics, Gordon Willis has staff described as 'operators', who not only develop products to meet individual customer needs, but also have a prime role in talking to the latter about their micro electronic requirements.

"Operators get to know and meet and talk to their customer. In fact we have customers come in, only last week, or the week before, we had Macways come in, talking to all the operators..."

At the professional services firm of Merry and Right, it is pointed out quite firmly that it is on the basis of talk that decisions are made as to whether or not the client takes up the legal product on offer. Nick Catt;

"The person that you buy is not Merry and Right, and it is not a document, you buy, if I am the lawyer, you buy me, you think that's the person I want to be advising me on my business, and so ultimately we are hardly ever going to sell anything unless you and I meet and we have a good discussion...Now that might be in the context of a lunch, it might be in the context of a business

meeting, it might be in the context of a formal tender process."

It can be argued with some conviction that organisations are made, sustained and then subsequently changed, through the process of talk. Language renders action meaningful. Watson (1994 pp13-28), argues that management is largely an oral tradition, where leaders spend most of their time talking. If we consider the actual nature of the talk that is carried out in these internal and inter organisational relationships, then the ideas of Marshak (1998) can be seen as having some currency. Marshak has identified three different types of talk, these are tool talk, frame talk and mythopoetic talk. Mythopoetic talk creates the fundamental ground of ideas, which are then selectively used through frame talk to set the context within which tool talk occurs. The latter includes instrumental communications required to discuss, evaluate, conclude and act towards some purpose. Action is part of this process.

For the marketing managers of this study, mythopoetic talk deals with the broad sweep of the social order on which perceptions of reality are based. Frame talk deals with our evaluative concepts. For marketing managers, this involves frameworks and symbols about marketing relationships. Finally, tool talk is the carrying out of decisions, relevant to the business relationship in question. After tool talk has addressed a particular issue, then actions and outcomes are evaluated through further frame talk. In Marshak's approach, there is no linear distinction between talk and action. One does not have to stop for the other to start. Talk action and decision making become inextricably linked, contained within the construct of language which in turn, places actors within the hermeneutic circle of their organisational worlds.

#### **7.4. HAVING A NOSE FOR WHAT'S RIGHT AND WHAT'S WRONG: THE ROLE OF TACIT KNOWLEDGE IN MARKETING DECISION MAKING.**

Mintzberg, in using his own metaphor of the strategist as a craftsperson, working with clay as a potter, draws out a central aspect of decision making. He points out that,

" She has an intimate knowledge of her work, her capabilities and her markets. As a craftsman, she senses rather than analyses these things; her knowledge is 'tacit'." (Mintzberg 1987 p67)

At Jenkins Print, Irving Wallace, the marketing director, introduces us to this tacit

dimension of marketing expertise and decision making.

" You have...the conscious incompetence, and the unconscious incompetence, the conscious competence and the unconscious competence and when marketing philosophy gets into the unconscious competence you know what is the right thing to do instinctively...if you are unconsciously incompetent, well you have had it..."

Central to a phenomenological perspective is intuition, see Moustakas (1994 pp32-3). It is argued that intuition is primary, an inborn talent which is directed towards the production of solid and correct judgements, in relation to everything in the world that presents itself to the individual. Intuition is the presence of an object and its immediate movement to consciousness. Covering areas relating to networks, relationships, and strategy as a 'craft', it seems to be the case here that much decision making is intuitive. This makes it a considerable way removed from the traditional planning models of marketing, with their emphasis on articulated rational action. In this study, table three (d) shows the range of marketing managers who appear to adopt a tacit approach to decision making. As Mintzberg points out above, the tacit dimension of action is central to understanding what managers do. Leadbeater (2000 pp28-9), describes tacit knowledge as something that is not written down and which can be hard to articulate. He suggests that it is often intuitive, habitual and reflexive. It is knowledge that is acquired by doing and communicated by example.

In relation to marketing, Hackley (1999) states the tacit area of practical knowledge refers to action which is left out of abstracted theoretical descriptions, but on which the accomplishment of action depends. He cites the example of the marketing mix, which constitutes a model, of which the experiential dimensions he believes cannot be reproduced very well. Hackley (1999) contends that high level practical knowledge in this area is tacit. He goes on to point out that a person who is highly accomplished in strategic marketing decision making, is likely to be able to utilise sophisticated and experientially mediated concepts in coping with marketing issues. For the marketing managers of this study, it is clear that there exists an important role for the tacit in decision making. The notion of social reality as a constellation of pluralities, suggests that knowledge is often personal and subjective. A consequence of this is that each marketing manager here has a reservoir of wisdom which is embedded within the context of their own organisation. This may not be able to be codified into one overarching new marketing reality, but into many.

It is possible to make a distinction between tacit and explicit knowledge (Baumard 1999 pp135-6). In the case of the explicit, knowledge is codifiable and transmitted in a formal and systematic language, whereas the former is personal, difficult to convey and not easily expressed. People in fact know more than they can say. For Hackley (1999), marketing theory's relation to practical expertise is critical in this respect. Importantly, he suggests that marketing theory needs to model this expertise in such a way as to ensure its acquisition. For Hackley, this is seen in terms of a pluralistic and practical approach to theorising in marketing. This would represent a movement of knowledge from the tacit to the explicit dimension (Baumard 1999, pp135-6). The understanding of this represents a major challenge to research.

For Gordon Willis of Mitre Technics, which operates in the area of micro technology, the new product development process is not based within an explicit and clearly defined approach, but is down to the tacit aspects of intuition. Current sales which numbers over ten thousand different types of product part, are plotted on the computer system, but then, " At the end of that it is a kind of guesstimate, we kind of look at new products out, and see what we think will sell."

What is being exercised here is judgement. Gordon Willis is having to deal here with uncertainty and ambiguity, as he cannot be sure that the new product will sell. Uncertainty and ambiguity represent for Brownlie and Spender (1995), a key feature associated with strategic marketing decision making. They suggest that these type of decisions, which form the majority for strategists, are not amenable to the analytic method of the planning driven model of marketing management. It is not an issue here of incomplete data, but illustrates instead, the importance of the experience and skills of individual marketing managers in the execution of decisions. The 'guesstimate' of Gordon Willis represents a heuristic for knowledge and expertise built out of his skills and experience.

For Brownlie and Spender (1995), each situation a marketing strategist faces has its own pattern of ambiguity and uncertainty. This ambiguity and uncertainty applies as much to competitors and the general business environment, as it does to customers. This state of affairs makes analysis and decision making very difficult. Gordon Willis has to judge how the actions taken by external agents, in this case customers, will impact on his firm. Can the marketing plan provide an answer? It appears not to for

Gordon Willis. It is argued here that the ambiguity and uncertainty of a socially constructed world cannot be collapsed into and resolved by, the traditional model of the marketing planning process. It is not planning technology that makes decisions, but people, who fund data with meaning through interpretative processes.

For Jason Hobart of Stirling Publisher, there is also a role for intuition, experience and skills in the new product development process. He makes the point that,

"...having invested in research we have the results, or should have the results in order to make a thoroughly objective decision, that is what we are trying to do and that is especially important when you have to make 7,000 decisions a year on product, whether you launch a product or not. But at the end of the day, one of the many values of the publishing team...is they have a gut feel for what is going to work and what isn't going to work, and even at the micro level, looking at the cover of a book, they can sense whether it is going to work or not, so I believe there is a role for making those sort of judgement calls..."

At Vincent Duke, Mike Clark, the marketing manager also draws our attention to the role of gut feelings in decision making. " A lot of the marketing is done on basic instincts, followed by a gut feel. "

In terms of dealing with competitors Jerry Court of Morris Grout also uses the notion of gut feeling to explain how he monitors their progress in terms of competing for building tenders from clients. Formal research is eschewed and instead,

" To me, other things have greater priority, but we do, I hate to use the phrase, almost a gut feeling....when you get put on the tender list, and you find out who else is on the tender list and then you find out who came where, and then watch in the press who won this, and who won that, you start to get the feel of who's healthy and who's not healthy, who's interested in this, who's not interested..."

Robin Cawley, of Nelson Universals, who earlier pointed out in previous sections the inherent problems in trying to model complex business activity on flawed rational models, indicates that in the end,

" All you are left with is gut feel and this kind of wisdom and experience. There is a place for that because in the absence of any clear direction you have to base it on something, you might as well base it on gut feeling as anything else."

The belief that decision making is based on gut feelings represents one dimension of the tacit which is often not articulated. One attempt to unravel the meaning of a decision based on 'gut feelings' has been provided by Antonio Damasio, a neurologist. For Damasio (1994 pp165-201), gut feelings are associated with what he calls the somatic marker hypothesis. His general theory suggests that before decision makers apply any form of rational cost benefit analysis to a problem, something occurs to the individuals' mental state, which is unrelated to pure reason. If a bad outcome is connected with a given response option, then individuals experience an unpleasant gut feeling. Because this feeling is about the body, Damasio gave it the technical term somatic (soma is Greek for body) and because it 'marks' an image.

This somatic marker acts as an alarm signal, which can make the decision maker reject the course of action immediately. As a consequence, this enables the individual to choose from among fewer alternatives, where a process of reasoning and final selection will still take place. When a positive somatic marker appears to the decision maker, as opposed to a negative one, then the former acts as an incentive. For Damasio, somatic markers highlight the importance of emotions in decision making, where they increase the accuracy and efficiency of the whole process. What Damasio's hypothesis suggests is that emotions are much more important in the decision making process than rational action perspectives are often prepared to accept. Along similar lines, Mangham (1998) points out that we are moved by emotions to obtain our first perception of a situation and this gut feeling is then elaborated, questioned, deepened or perhaps modified. From a phenomenological perspective, this is an individual process. Reality is interpreted not through abstract rational systems external to people, but via subjective conscious states, which often form into stories to better explain the nature of that reality.

Mike Clark of Vincent Duke comments on the role of his managing director and the instinctive approach to decision making which is adopted when a new business opportunity is presented. Here, the somatic marker idea could be seen as being applicable, with a gut feeling having the first impact on the strategist.

" It is just a kind of a instinctive knowledge of what he needs to set his business up...I mean Brian has got an instinct for things and a bit of a nose for what is right and what is wrong."

The analogy used here, which suggests that decision making is primarily about a



sensing process, seems to capture a key essence of this study. The managers depicted here are in one sense trying to 'track' their way towards hoped for successful strategies. This is achieved through processes of trial and error, through talk, intuition, relationships and importantly, by making judgements out of current and past events. Arguably, in some societies, good trackers need a well developed sense of smell if they are to hunt down their quarry. Sudden changes in scent may suggest that the hunters have moved from the wrong to the right track. Is the animal now behind or in front? Are the hunters still pursuing or have they become the pursued? These actually make intriguing questions of strategy. Whatever the situation, it is necessary for the tracker to be alert at all times to the current situation. Circumstances can change very rapidly and out distance the plans laid earlier. Furthermore, what the scents mean and whether or not they are new or changed, may only be ascertainable to the tracker, and not to others in the group. What attempt if any should the tracker make in sharing expertise with others in the hunting party? Whatever the decision, the scents must be acted on, if the ultimate goal of capturing the animal is to be achieved.

## **7.5. FIGHTING WITH ALLIGATORS: THE WORK OF MARKETING MANAGERS**

If we consider the day to day work of the marketing managers in this study, it is clearly not dominated by an attachment to the tenets of the traditional rational model of marketing planning, which assumes that managers are all broadly involved in carrying out very similar activities. As Pickton (1993) points out, it is not wise to make wide ranging generalisations about what managers do with their time. What is needed, he points out, is a deeper understanding of how managers operate effectively in the different circumstances in which they are found. For Hales (1986), a great deal of management time is not spent on planning, controlling and organising, as traditional theory postulates, but on day to day trouble shooting and ad hoc problem solving. This issue is reflected in table three (e), which shows that the activities of managers in this study are dominated by the 'day to day'.

At Jenkins Print, Irving Wallace gives voice to this issue when he explains how he views his role. He uses the metaphor of an individual travelling through a swamp, who must first overcome the alligators in order to get out and reach the required destination. The day to day problems are represented then by alligators, which must be dealt with before the journey can be completed successfully, the latter being the

marketing plan and planning process.

"...inevitably, the day to day tends to overwhelm the long term because it is the usual alligators in the swamp isn't it. I think most of the time you are fighting alligators, you have to make the time, step away from it, get the long term produced as well."

There is a commitment to planning activity here, but there is also a clear recognition that the character of the work is dominated by the on going nature of action in organisations. For Sheila Harris of Henry Armstrong, the paintbrush manufacturer, the conflict between achieving short term sales targets and developing longer term plans is also graphically described in metaphorical terms.

"...there is always a need to meet monthly sales targets, but at the same time we have to plan ahead as well, so you have to be schizophrenic, its as simple as that really, so its both."

For Jerry Court of Morris Grout, the building contractors day to day issues also impinge heavily on his role. suggesting that there exists a conflict between on going tasks and long term planning." There are a lot of day to day activities, and I would like to have more time to spend on planning..."

At Vincent Duke, Mike Clark's work is also about hands on, day to day activity.

"...there is a complete emphasis on hands on. What that means is what we don't have is people who do nothing other than direct and manage other people within the marketing team. So, as well as providing some direction and guidance to some of the junior members of the team, at the coal face, as I keep calling it, I do have a very hands on role in the design of products, I actually sit there at the machine and type out the product specifications for example...so there is this emphasis on nobody really sitting there, just kind of organising other people."

David Borrowes of Leighton Jay Technical Services also alerts us to the fact that senior marketing managers also have a hands on role.

"...what you find is there is always a situation where you end up getting involved in a more hands on way than you should be. As a guy in charge, as a marketing director, it would be nice to be able to sit back and just think strategic thoughts all day, but the reality of it is in a small company there just isn't that freedom, you have to get involved almost at managerial level to drive

things which is, if there is a personnel problem, I take responsibility, it is my fault, because I have put people in place...but also there is an element involved in responding to things instantly when you get information back..."

Trevor Cole of Lewis Stuart, the industrial motors manufacturer, comments on the central role of people issues and emergent problems in his job and the need to respond to immediate concerns, rather than to the more formal strategic planning aspects. His time is taken up with,

"...it is personnel issues, it is surprising how much of your time is taken up with, when you employ people, problems of various kinds, whether it be organising them, whether it be their various problems, work related or non work related, those types of issues. The day to day planning of work, having a look at problems associated with orders not coming in as you anticipated..."

## **7.6. BULLSEYES AND RUDDERLESS SHIPS: THE MARKETING PLAN AS A CUE FOR ACTION**

There might appear to be an apparent contradiction in the interview conversations which must be addressed here. In the final section of chapter six, it was made clear that marketing plans are written by the vast majority of organisational members in this study, plans which it was argued, reflect very much local circumstances. The point is that the sections above appear to suggest that these plans are not followed closely. Strategy, defined in Burgelman's (1983) terms as a theory explaining why firms are successful, is emergent, based on relationships, talk, tacit knowledge and carried out by managers who are constantly juggling their roles. The implications of this are that we have to ask what the role of the written plans are, in the light of the above evidence. Clearly considerable effort and thought is put into the construction of the plans, as indicated by the responses of the marketing managers earlier.

Mike Clark marketing manager of Vincent Duke, the financial services company, offers us an important insight as to the role of these marketing plans. "given that things are constantly changing...but, if you didn't have the plan, you would be a rudderless ship..."

For any ship on the sea it is vitally important that they have a rudder. Without the latter, the ship cannot be steered and navigated, but with the rudder it is possible to

take the ship in any direction over either a long, or a short period of time. The rudder provides the ships crew with its purpose and sense of direction. The written marketing plans fulfil just the same function for the marketers in this study. Strategy can, and will be developed out of everyday action. The marketing plan however, helps to define broad goals and moves organisational members in the general direction of what is required. In this sense, there is no contradiction in having a marketing plan but at the same time not rigidly adhering to it. At Morris Grout, building contractors, Jerry Court indicates the importance of the written plan. Alongside this, there is also the clear commitment to ensuring that the company can react to changing circumstances if necessary.

" Yes, we have a business plan, of course every company should have a business plan. We developed a business plan last year and it has been running now a year with our new managing director who has been with us fifteen months. He developed the business plan we are working to, and it has just gone through a period of updating, because business plans must be totally flexible, you have to keep the flexibility in the thing."

Mary Stone of Samsons the other building contractor in this study, alerts us to the point that a marketing plans is written, but proves difficult to keep to. Here too, the plan can perhaps be viewed as no more than a general guide to action.

" The last one we did was in June...which basically covers what we hope to achieve in the future and we do try, it is not always easy, you have these ideas, and it isn't always easy to stick to it..."

At Merry and Right the other legal firm in this study, Nick Catt the marketing manager talks about the marketing plan being a metaphorical 'bullseye' which he wants his lawyers to generally aim towards. The closer to the target the better, but success can still come if they deviate from the bullseye and score elsewhere on the board. Again, the plan moves employees towards a general goal, by activating them with an image. Here, in general metaphorical terms, there is a strong suggestion that there is an important role for all marketing plans in terms of being 'rudders and bullseyes' for organisational members. Without the rudder the crew would be directionless, without the bullseye, the darts team would be missing the central purpose of their sport. Without the marketing plan, employees would have no image to work towards, little to animate them or little to provide them with a sense of direction.

" I use this term a sort of bullseye idea...in terms of somebody at the centre of

the bullseye, is somebody that we do all of their legal work for, and it is a long term client, and somebody round the outside of the bullseye is somebody that we know the name of, but have never ever met, and I like to try and use the concept with them, of moving people closer into the centre of the bullseye, and so the marketing plan is more along the lines of who you going after, what are you doing in terms of trying to get them closer, what are our aims in terms of trying to get them closer to that bullseye?"

At Nelson Universals, Robin Cawley also raises the issue of the sometimes problematic relationship between having a plan and the development of marketing strategy outside its boundaries. For him, the rational planning model does not capture the complexity of the world, a point argued by Shaw et al.,(1998). There is still a place for a plan however. It seems to act for Robin Cawley as a guide as well, albeit an imperfect one. He points out that, for the linear rational model business is in reality,

" Just too complex. What tends to happen therefore is you build the model in a very simplistic fashion and then everybody decries it, but in the absence of that you have got nothing."

For Weick (2001 p346), strategic plans animate and orientate people. Once organisational members act in a social setting, they produce tangible outcomes. From the latter cues are extracted, which help to provide people with an image of where they are going. In this study, locally constructed marketing plans do have an important role to play because they have a capacity to evoke action. The marketing plan acts as a point of reference, as it generates cognitive activity leading to action. Starbuck (1993), points out that it is useful to allow deviation from plans to take account of new information and unexpected events, a point made more than once by some managers in this study. For Weick (2001 p346), any old plan will work in organisations, because it is often sufficient to get the company moving, making it possible to learn what is going on and what needs to be done. Table three (e) illustrates that the majority of marketing managers here in this study, use their plans in this way.

It has been shown here that the strategic role of the marketing manager involves much more than planning. In this study, managers understanding of events are not mediated by the structure or the language of formal plans. Understanding is literal, figurative and expressed in an everyday language. The narrative style features strongly. For Argyris (1999 pp20-1), considerable evidence exists to suggest that much learning in organisations takes place on the basis of trial and error. In interpretative terms, *real meaning comes* not from the strategic plan, but from how people will

respond to it and what sort of stories they will tell about it. It is what managers and employees do which is important, not what they plan. Plans have a role to play in getting organisational members to move in some general direction. It could be argued that plans could appear in other formats as well, provided they fulfilled this function. It is action however, which produces outcomes. What might appear as an imperfect plan, could prove to be effective if it induces activity, constant updating and purpose in organisational members. Simkin (2002) notes that while many more organisations now complete marketing plans, there still exist problems in relation to management style, content and the skills of those who plan. Many plans here could be regarded as imperfect by these standards. But this is to miss the point. These apparent imperfections are not a problem, as the plans are only guides to action and are not the action itself, which in the main, has brought success to the majority of organisations studied here.

# TABLE THREE

A summary of managers perceptions

THEMES	ORGANISATIONS																						
	MT	JP	H	S	T	S	LJ	A	AR	E	T	N	B	NB	L	JD	V	BL	MG	MR	E	MK	N
Marketing strategy emerges from action a)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	●	✓	✓	✓	✓	✓
Customer relationships and marketing networks are central to decision-making b)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	●	✓	✓	✓	✓	✓	✓	✓
Marketing decision-making emerges out of talk c)	✓	✓	✓	✓	✓	✓	✓	✓	✓	●	✓	✓	✓	✓	✓	✓	●	✓	✓	✓	✓	●	✓
Aspects of marketing decision-making is based on tacit knowledge d)	✓	✓	✓	●	✓	✓	✓	●	●	●	●	✓	●	●	✓	●	✓	●	✓	●	●	✓	✓
Action of marketing managers is based in day to day activity e)	●	✓	✓	●	✓	✓	✓	●	✓	●	✓	●	✓	✓	✓	●	✓	●	✓	✓	●	●	✓
The written marketing plan acts as a guide to action f)	✓	✓	✓	✓	✓	✓	✓	✓	✓	●	✓	✓	●	●	✓	✓	✓	●	●	✓	✓	●	✓

## **CHAPTER EIGHT**

### **STRATEGIC PLANNING AND PHENOMENOLOGY: TOWARDS A SOCIAL CONSTRUCTIONIST ACCOUNT OF MARKETING THEORY AND LEARNING**



## **8.1. THE RESEARCH FOCUS: A SUMMARY**

From an examination of leading texts and articles on marketing planning, it is clear that there exists one major view on how to conceptualise theory and practice (see Kotler 2000 pp84-86; McDonald 1999 p40; Greenley 1988). Based on an extended review of the literature, this study has argued that there exists significant problems associated with this conventional perspective on strategic marketing planning. Some important studies have indicated that in practice, the way in which marketing decision making is executed, fails to a large extent to reflect the way in which it is written about in texts (Hackley 2001a); (Brownlie and Saren 1992); (Brownlie and Spender 1995); (Brown 2001 pp110-125); (Piercy 1997 pp3-4). Other studies point to major problems with specific marketing decision making tools and with existing notions of marketing theory (Armstrong and Brodie 1994); (Hooley 1995); (Wood 1990); (Kent 1998). Whilst it is useful to reiterate and review these problems, this of itself does not represent a sufficient way to develop our knowledge of marketing theory and marketing practice in general. The intention in this chapter is to start to build an argument which will lead in the conclusion, to the development of a new theory of marketing planning and a revised form of strategic plan.

In addressing the general issue here, it can be pointed out that some marketing writers point to the failure of marketing planning as a result of implementation difficulties, locating problems in the realms of inadequate skills, lack of marketing knowledge and internal management of cultures, see Piercy and Morgan (1994); McDonald (1989); Dibb and Simkin (2000); Simkin (2002). This approach however, never really questions the way in which marketing is conceptualised, but instead, has actually led some academics to redouble their efforts on behalf of conventional approaches to marketing and marketing theory. Other influential writers, having investigated and shown that problems do exist with the way in which rational technical marketing is implemented, simply move aside from asking any difficult questions about the dominant view on the nature of marketing ontology, see Greenley (1988); Greenley and Bayus (1993). This seems to represent a tacit acceptance of the conventional view of marketing, which sees the latter as a set of universal generalisations applicable to any business situation. It is argued that none of these approaches are likely to be able to advance very significantly our view of how marketing is actually successfully implemented and managed in practice.

This is because all these perspectives view practice through the ideology of marketing's dominant discourse. Perversely, in this perspective, if managers get it right, they are still somehow wrong, as they are not utilising correct principles. The dominant perspective on research into marketing is not particularly interested in engaging with other interpretivist views on what marketing is. Furthermore, the principal methodology that is employed by those researching into marketing management, the quantitative questionnaire, is unlikely to be able to reveal the richness and complexity of the life worlds of those working and making marketing decisions. The understanding of these areas from a deeper perspective can only be meaningfully achieved by the use of a phenomenological, ethnographic framework, facilitating access to a knowledge base about marketing that is rooted in practice. In terms of this study, the existing marketing planning paradigm represents the framework which was used to begin to explore what actually goes on in organisations under the name of marketing. The inappropriateness of the conventional model and its existing inaccuracies, served as the driving force for this study. So far, with a few exceptions, there exists little in the way of a qualitative research tradition in marketing management, which is aimed at developing new approaches to the discipline. The study here has addressed this issue and it is argued that a new contribution to our knowledge of marketing practice and theory is the result.

What has this study generally revealed about marketing strategy and planning as it exists in the perceptions of organisational members? Significantly, the most important issue to note here is that marketing is unavoidably a locally dependent phenomenon, both in the meaning it holds for organisational members and for what it is in practice. As pointed out in chapter four, it became apparent that the material from the interviews contained many references to metaphors. What these metaphors assist in showing, is that the classic model of marketing planning is not in place in organisations and that alternative, socially constructed realities exist. Out of this, new theory can be developed. How we understand marketing, in terms of planning and strategy, is revealed to be something different from the way it is portrayed in the mainstream perspective. The business environment, marketing planning and marketing plans are all social and local constructions, being highly idiosyncratic and context dependent.

This study has found that marketing in action is actually the result of a complex range of perceptions, interpretations and activities, which can never be satisfactorily captured or explained by a textual plan. To this extent, the simplicity inherent in the established

marketing planning paradigm does not and cannot, reflect the reality of organisational life. It is not a case of whether or not marketing practitioners are getting it right or getting it wrong, according to the prescriptions, but to state that these prescriptions can only ever reflect one version of reality, a reality that very few previous studies appear to be able to confirm. In other words, this is a prescribed reality based on inaccurate assumptions and false premises. The point is that marketing in organisations is composed of many realities, the sense of which are worked out by organisational members in particular spatial and temporal contexts. This has been the case for the marketers in this study. Success has come to the vast majority of them not through following prescriptive theory, but by developing their own socially constructed theories of practice, in local contexts.

It is interesting to note that there is some coalescence in the nature of these local realities. This suggests that it is possible to offer up the insights here as a form of alternative, practical theory which can be viewed as possible guides for action for other managers, in much the way that is suggested by the last section in chapter three. In general, the research here has shown that written plans act as local 'neighbourhood' guides to action, pointing individuals to places they need to get to. People get to these places in different ways; organisational members are not transported by the linear plan, but by tacit, intuitive and experientially mediated knowledge, by emergent action, by on going things like talk, networks and relationships. Analytical marketing tools provide some general insights to some managers, but not contextual depth. Additionally, the ingredients which go into managers' marketing mixes are all mainly local. Clearly, significant implications flow from these issues.

## **8.2. REFLECTIONS ON THE LIMITATIONS OF THE STUDY AND METHODS**

As a result of the nature of the research focus adopted here, it is inevitable that there are some perceived methodological problems associated with it. Firstly, it can be argued that this study's findings are not obviously immediately generalisable to other marketing and organisational situations. This means that the question may be asked as to what extent the findings here are representative of the perceptions of marketing managers who operate in other contexts. This view partly misses the purpose of this study however. The intention was never to attempt to produce empirical generalisations that could be tested in other circumstances, but to develop instead,

various theoretical inferences and analytical generalisations about marketing as it is practised in a limited range of organisations. Whilst action is different depending on the nature of the organisation, the generalisation can be made that all action is locally constructed.

The particular theoretical inferences dealt with in this research, which are grounded in the interview material gathered, could be examined by other researchers in other marketing contexts, using a similar research approach. The contention here is that as action in organisations is a phenomenological, socially constructed activity, then the 'localness' of marketing practice will emerge very strongly in any future findings. To try to look for generalisable findings is to miss the point of the phenomenological - ethnographic approach. The latter represents an attempt to gain rich and deep knowledge in small scale settings. In this sense, the research can be seen as being better than the use of structured and standardised questionnaires which it is argued, produces little in - depth understanding of individual situations.

A problem not unconnected to the issue of generalisability, which can be raised with the research here, relates to the issue of replicability. It might be the case that even if the same questions are asked of other respondents, in other similar studies, then the respondents may all answer differently. In-depth interviewing can easily go off into unexpected areas. The case is true that it is difficult to make qualitative research instruments standardised and even if this is attempted, the complexity of local situations could very well be lost. Quantitative researchers would probably certainly say that problems exist here because there is actually no research instrument used, which helps to ensure replicability and standardisation (Gill and Johnson 1997 pp78-95).

Despite the beliefs and evidence of the interviewer, rapport may be seen as being weak, from the perspective of the interviewee. Hence the validity of the research might be questioned. Ethnomethodologists, who are often wary of conducting interviews, (see Silverman 1993 p106) would put some of this down to the fact that researchers actually report more on the nature of the interview itself, rather than on the research topics of the discussion. Furthermore, the final results of the research could be interpreted in different sorts of ways, by others, depending on the analyst's perspective, so as to make comparisons difficult. The very richness of qualitative data can open up many issues. In the interviews conducted here, the researcher has

uncovered one version of the truth, but it is recognised that it can also exist in other forms as well.

When thinking about improvements to the research methods used here, it could be argued that by conducting further interviews with each manager, possibly a greater depth of information could have been obtained about each company. This would have been particularly helpful in the first sections of chapter three for example. This request may have been denied however, due to lack of time on the managers part. Additionally, this request could possibly have endangered the rapport built up during the first interview, if additional interviews were seen as an unreasonable burden by the marketing managers. In terms of the use of other methods of research, it could be argued that this inquiry could have been more ethnographic, while still retaining fidelity to an essentially phenomenological perspective. Time spent with each marketing manager was largely restricted to one interview and it would perhaps have been useful to supplement this with periods of observation. This would have enabled the researcher to see some of the practices in action that were being talked about during the interviews. This would have facilitated a greater immersion in the culture of the organisations being studied and possibly have produced a greater awareness of, and more stories about, marketing processes.

The phenomenological method adopted here has highlighted what goes on in organisations under the name of marketing. It has furthermore demonstrated how organisational members make and enact the meaning of marketing. This process in the main has been successful for the organisations of this study, a point clearly demonstrated in the opening sections of chapter three. As an alternative complementary approach, it might have been useful to undertake a similar study in organisations which are less than successful, although obtaining access and ensuring openness of responses may have proved to be problematic. Useful contrasts could have perhaps been obtained, aiding as a consequence, the theory development process of the final chapter in this study.

If more time and more resources had been available, the single in - depth interview approach could possibly have been widened, to include some focus group research, or individual interviews with other marketing staff, in order to gather their views on marketing. This last approach need not be seen as being a way to validate what the marketing managers were saying, but to provide some different perspectives on the

marketing planning process. Furthermore for example, marketing plans and other documentary sources could have been examined, as sources of evidence. This would have meant rethinking the whole philosophical and methodological approach of the study and its justification however. The problem here is that in a phenomenological inquiry, it is very important to ensure that the primary source of evidence remains the subjects' sense perceptions of objects (Moustakas 1994 p59). An 'objective' examination of marketing plans would have resulted in a shift of emphasis in the research, meaning that the importance attached to the understanding of interviewees subjective conscious states, might have been easily overlooked, to be replaced with a concern for exploring data external to the subjects.

### **8.3. TECHNICAL RATIONALITY AND MARKETING PLANNING KNOWLEDGE**

Drawn from the research findings, what the emphasis on metaphors, language, local experience, interpretation and phenomenological perspectives achieves in doing, is to critically address the current and dominant structure of knowledge, as it is presently presented in marketing planning approaches. In developing a critique of marketing planning conventions, it can be argued that there is clearly present in the latter, strong tendencies towards a reductionist technical rationality (Dunne 1999). One mode of rationality has established an ascendancy, so that knowledge assembled and activity conducted within its framework is recognised as the respected form. Context dependent frames of reference, the type of which dominate this piece of research, are often suppressed in favour of the marketing planning frameworks of McDonald (1999 p40). In this latter framework, marketing planning procedures are laid down which insist on replicability and the adoption of an interpretation immune language. As this study has clearly shown, marketing planning frameworks used by organisational members cannot be reduced and collapsed into the rationality of the dominant paradigm.

This technical paradigm is based in the notion of 'Techne' (Baumard 1999 pp20-2), where matter form is at the disposal of the producer, who can construct a design for planning and execution. To technicise a practice involves decomposing it into discrete tasks and then analysing systematically the elements necessary for successful performance of these tasks. This involves disembedding the knowledge or skills implicit in the performance from the immediacy of the particular situation (Dunne

1999). The knowledge is encapsulated then in explicit generalisable procedures and rules, as is the case with marketing planning (Brownlie and Spender 1995). In the conventional model, the tasks of marketing planning involve, for example, the setting of discrete objectives and then the development of strategies. These rules can then be applied to the various situations that arise in practice, so as to meet problems. In the research here, this process has been rarely encountered, as strategy usually emerges out of action. Plans do not act as rules, but as intuitive guides. One rule of conventional planning is that a marketing audit must always be carried out before objectives can be set. Marketing problems should be resolved by the application of this procedure then. Rules, control and efficiency are made possible by the fact that the system is only very partly dependent on the individual judgement of practitioners. In metaphorical terms, the dominant marketing knowledge is thus perceived as a rigid and tangible key, which is made to fit all manner of locks. The reality is that there exist many different types of locks and keys.

For Dunne (1999) and Brownlie and Spender (1995), at the heart of practitioner knowledge is judgement, which is invested in action. It is knowledge about dealing with the situation as it is now, which may deviate from the standard theory. This may be a deviation which has been met previously. To use judgement, means to respect the individuality of the situation. It does not mean imposing on it a general rule. Dunne (1999), suggests that the established rules and theory are not ignored however. For him, there should be an attempt to try and bring the situation into some relationship with the codified rules. The question arises here, to what codifiable rules are we referring? Also, should there be a set of codifiable rules? A problem here is that we may well be moving back to prescriptive theory, when what is really required, is that marketing managers should have at their disposal a range of practical theories, which can be evaluated in the context of their own organisation. In the final chapter, such practical theory is offered up as a way forward. Here, it is possible to mention again Brief and Dukerich's (1991) notion of theory as an idea generator, which suggests a course of action but importantly, does not prescribe it.

In some cases in this study, it is clear that marketing managers have drawn on aspects of the conventional model of planning. As with the cases dealt with earlier in chapter six, a number of organisational members in this study were attempting to use the various portfolio models in order to try and make some sense of their local situation and as such, these models were utilised in a largely intuitive manner. These models

appear to have greater relevance than the linear model of the marketing planning process. There is though, at present, really only one model of marketing planning which can be used as a theoretical resource and what is needed is rather more diverse types of theory, which can act as guides for managers. One such approach is the 'strategic marketing signpost' dealt with in the final chapter.

The contribution of those who do not use the portfolio models must be heard and recognised by the marketing community, particularly if they can provide alternative practical theories. In the situations of this study described above, the adeptness and relevance of judgement in local contexts means that neither is there an unprincipled dealing with particulars, or a wholesale reliance on the general, but a mediation between the two. Nevertheless, it is clear from this study, in general terms, that action and meaning in local contexts is not primarily drawn from analytical marketing models, but from the individual judgements made by actors on issues as wide ranging as strategic responses to relationships, marketing mixes, and emergent strategy.

In dealing with this issue, Brownlie and Spender (1995), argue that marketing decision making technology should be embedded in a specific organisation, where specific cultures and unique rationalities exist. This means that judgement is unavoidably built into a process of which the analytical technology is only one part. They argue that this technology can never be a replacement for judgement, but an aid to it. In appreciating this, it is necessary to recognise that reality is much more complex, interactive and dynamic than is presented by the technical rationality model. What is argued here, is that in marketing, we need to move away from a situation where the codified rules are presently monolithic. Managers in this study operate with various approaches to marketing, each of which could become a basis for developing new frameworks for understanding. Potentially, the field of marketing could be made up of a variety of perspectives, which are open and contestable, similar to other applied disciplines like developmental psychology and criminology.

For Baumard (1999 pp198-223), there has to be an element of creativity brought to each strategy development situation. Judgement outstrips what is technically formulated and remains, to a large extent, in the tacit dimension. This study has clearly shown the significance of tacit knowledge to marketing decision making with sections on marketing as a 'black art' and 'having a nose for what's right and wrong'. In providing a framework for explaining what is going on here, Baumard (1999 p53)



uses the Greek word 'Phronesis' to describe what is non scientific and practical. This is contextual knowledge, generated by lived experience and demonstrated by the managers in this study. In terms of developing and implanting a marketing strategy, what managers do is more complex and nuanced than can be rendered in an explicit account. Judgement is not assured by exposure to the general principles, but has to be mediated by experience, see Dunne (1999). Of course, raw experience on its own is not sufficient, one must learn from it. Clearly, personal qualities have an important role to play here, where there is an openness to learning, patience and where a sense of balance is struck between the general theory (or theories) and the particulars of the local situation. A key implication here is that much marketing is learnt in the context of the job and the organisation, an issue that the research of Hackley (2001c) on work in advertising agencies, appears to support.

The dominant technicist model of marketing planning cannot capture issues of rhetoric and politics, where humans construct their views of the world. The individual is an intervention that can work with or against the various technologies of marketing planning in use. Managers in this study have extensively indicated that at times there exists the need to improvise strategy where judgement is called on. Suddenly a new opportunity presents itself which must be capitalised on. This is a point raised by Richard Coates of Evertons the legal services firm. He pointed out that Nelson Universals suddenly asked him to pitch for their work, demanding an almost overnight improvisational switch in resources. Mike Marston of Archer Television also commented on this, when he reviewed the use of his studio. A planned public relations activity was prepared to be abandoned if the studio could be hired out and used more intensively. These are judgement calls, based on experiential learning, which underpin the various approaches to strategy adopted by the managers in this study.

Marketers here are not dealing with closed issues which can be resolved with a redress to a technical rationality present in texts. Importantly, there needs to be a move aside from the reliance on the current technical rational model, to build new acceptable non reified theories, that incorporate features of marketing management which exist in practice, but which lay outside current textual knowledge. To attempt to resolve practical issues of strategy in organisations, means to move outside the standard technicist paradigm of marketing and to use experientially based judgement. For Brownlie and Spender (1995), it is in these situations that learning occurs. Managers become involved in experimental processes, where strategically oriented action may

set off a variety of unintended consequences. Unlike the laboratory however, where results that disconfirm can lead to discontinuation at perhaps little cost, in a practical field like marketing, not to proceed may be an error in itself. This could be the failure to release new products for example. Again in these circumstances, judgement is required. For Sims (1999) stories are not just told by one person to another, but represent ways in which we talk to ourselves, thus shaping and retaining events. Narrative helps us to remember what is complicated. The suggestion here is that a way forward for marketing academics and practitioners is to place stories more centrally in the process of planning and developing strategy. Marketing managers construct their reality through metaphors and stories. Through these experientially mediated symbols, individuals learn (see Sims 1999).

In terms of theory development, it is argued that there is too much of an extended engagement with the technicist marketing tradition, which on its own, does not provide students, young professionals or developing marketing managers, with what is required to perform effectively. Successful organisations, where tasks are complex, are ones with an inbuilt tolerance for uncertainty. Managers in this study seem to recognise this point, where issues are often reconfigured outside of the traditional technicist framework of marketing planning. Examples of this include Thor Engineering and Vincent Duke, whose marketing managers expressed reservations about traditional technical marketing planning and adopted their own approaches. Jones (1990), indicates that it is the knowledge as practical experience view which must prevail if we are to deal effectively with management education. The arguments raised here, combined with the research findings which stress the local, suggest that attempts need to be made to reconfigure and reconceptualise the way in which we currently perceive marketing knowledge. One view that attempts to understand how we should cope with a changing world emphasises that we must rely on a single world view of marketing and on the consequent expert, who usually recommends implementing the technical rational model. This perspective currently dominates the marketing pedagogy. The other view suggests that we must place our confidence in the lived experiences and insights of those who act. We should then try to develop this into a plurality of perspectives about marketing theory. A useful contribution to this debate is represented by the communities of practice perspective.

#### **8.4. MARKETING AND COMMUNITIES OF PRACTICE: THE ROLE OF SITUATED LEARNING**

What has emerged from this research is the important role that communities of practice (Wenger 1999 pp3-15), play in the life worlds of the marketing managers who were interviewed for this study. These communities of practice draw on a knowledge base which is different from the dominant technical rational model. The problem for practice is that the canonical prescriptions of orthodox marketing planning come in the form of a directive documentation. This documentation provides a decision making sequence that assumes predictable and rational individuals and a relatively unproblematic process. Both of these assumptions fall well short of the complexities of actual practice. Even though managers make use of some planning tools, this is largely done in a qualitative and intuitive fashion.

It is clear from the research here that individual managers develop their own non-canonical practice, despite having a knowledge of the prescriptive linear planning literature. In the vast majority of interviews, it became very evident that managers understood the traditional rational model, but always moved beyond it to discuss indexical accounts of their practice. As managers were constantly being asked to compare established marketing theory to practice, it is likely that the interviews would have quickly broken down if they had not been familiar with the traditional general model. To be able to do an effective marketing job, the managers in this study have had to make sense of marketing planning in a way that the traditional prescriptions do not allow. Importantly, learning in working thus becomes an occupational necessity, with complexity and ambiguity as central features of marketing decision making.

Very significantly, learning has been shown, by the managers in this study, to take place within the context and framework of social participation. This is achieved through interactions, in networks, through talk and relationships. Clearly, the differences in perspective and the multiple perspective among co - participants, are instrumental in generating learning. What this suggests is that an important source of practical, workable knowledge is through the concept of communities of practice. For Wenger and Synder (2000), communities of practice represent learning through doing. In an earlier work Lave and Wenger (1991 p53), describe communities of practice as systems of relationships between people, the activities they are involved in and the world. These elements are regarded as being an important condition for the existence

of knowledge. For Wenger (1999 p5), the approach here represents a social theory of learning. It becomes important then that in learning about marketing, a full account is taken of practice. From out of this practice, it is argued that people principally learn how to think and enact marketing as a local construction.

Brownlie and Spender (1995), also point to the importance of communities of practice. They argue that the process of acquiring the experience which shapes managerial judgement, can be gained by the novice through working with those who have already demonstrated ownership of the appropriate abilities.

Communities of practice can be characterised as learning communities. Much of this thesis is about how managers learn in a social situation, within their own communities of practice, rather than from canonical, prescriptive texts. Learning can be seen as being an inherent part of a shared social practice, as something interpreted from the world we live in. This is a social constructionist approach to learning (see Elkjaer 1999). Importantly, It is non prescriptive, reflecting the points of Brief and Dukerich (1991) made earlier in chapter three. A phenomenologically informed social constructionism reflects the concept of working as learning, where learning is an inevitable part of people working together in social contexts. Hedberg (1981), is another who notes the importance of the social and communal aspects of learning.

Practice is central to understanding work. The abstractions of much current marketing planning theory, contained in technical rational descriptions, can distort or obscure the intricacies of that practice. Without a clear understanding of those intricacies and the role they play in the organisation, practice itself cannot be well understood or engendered. Brown and Duguid (1991), suggest that the ability of people to learn in the situation, indicates that all attempts to strip away context should be cautiously examined. Didactic approaches, on their own, can have the tendency to separate learners from authentic work practices. Technical rational theories and models of learning, which are strongly implicated in the documented view of marketing, see the whole process as mainly being about the transmission of explicit abstract knowledge from the head of an expert, to that of one who knows relatively little. In conventional marketing courses, this knowledge is often communicated in surroundings that specifically exclude the complexities of marketing practice and the setting for this is assumed not to matter. As a consequence, it seems clear that approaches to learning about marketing need to draw fully on the experiences of work. Strongly implicated in

the accounts of marketing that managers give here in this study, are ethnomethodological indexical realities, which can only be learnt about in the context of an organisation.

Here, the transfer view of knowledge is seriously questioned. Learning needs to be seen as a process of social construction which is put back into the contexts in which it has meaning. What is learnt is profoundly connected to the conditions in which it is learnt. It is the actual practices of the organisation that in the end determine success, not an abstracted marketing theory. It is situated demands, which mainly determine the nature of each marketing managers strategy. Strategy thus becomes improvised. As a consequence, a central issue in learning about marketing is that of becoming a practitioner. This can draw attention away from the transmission of the abstract, to situated learning.

The reliance alone on formal descriptions of marketing planning as a basis for learning may make it unlikely that learners will be able to acquire the implicit practices required to do effective marketing. Wenger (1999 pp73-85) argues that a great deal of learning, understanding and interpretation, involves much that is not explicit or explicable, being framed instead in a local community context. Discussions of marketing as a 'black art' in chapter five, lend weight to this argument. In this context, Lave and Wenger (1991 pp35-43), have developed an analytical concept known as legitimate peripheral participation, which assists in the process of gaining knowledge in the work situation. This concept derives from an interpretation of learning in the apprenticeship situation (Wenger and Synder 2000). Learning as participation in practice plays a central role. There is little differentiation then, between participation in practice and the activity of learning. Legitimate peripheral practice points out that learners are participating in communities of practice in interactional contexts. In order that newcomers can accumulate knowledge and acquire skills, they must participate in the social and cultural practices of the community. In this community, stories get told to aid the process of learning.

Marketing managers and their organisational and intra organisational communities of practice, have offered up ideas based on alternative views of organisational marketing activity that are simultaneously informed and checked by experience. The case is that marketing managers in this study respond very much to their local situations and what these throw at them. This is reflective of the concept of bricolage

(Weick 2001 pp62-64). This is the ability to make do with what is at hand. What learners and the marketing managers featured here need, for their enacted environments and for bricolage, are not the rigid models of marketing planning, but robust local models which assist them in dealing with local difficulties and issues. This is the case with their locally constructed marketing plans which act as guides to the complexity of local situations. This suggests the need for a new theory of marketing planning that takes full account of the local construction of reality.

## **8.5. TOWARDS PRACTICAL KNOWLEDGE: WORK BASED COMPETENCIES AND MARKETING PLANNING SKILLS**

One approach which moves towards more practically based knowledge, attempting to take account of the importance of communities of practice and the learning engendered in them, is presented by the emphasis on the development of work based competencies. Learning takes place as newcomers become involved in modified forms of participation. Wenger (1999, p100) points out that proper learning is not achievable through the reification of a curriculum, but must involve the process of legitimate peripheral participation. The following initiative attempts to move towards this approach. For Hill et al.,(1998), what is required is a work based learning programme in marketing, which can effectively address the challenge of the lack of marketing planning skills, highlighted by McDonald (1989). Work based learning is about linking learning specifically to the work role.

Hill et al.,(1998), suggest that academics and practitioners need to close the theory practice gap in respect of the marketing planning barriers that have been identified by McDonald (1989). Hill et al.,(1998), postulate that the competent marketing planner is one who, when observed, demonstrates that he or she is competent in respect of a particular activity. The competency framework approach indicates that some marketing tasks and techniques are common to the effective performance of all managers. This might suggest that the technical rationality framework is the dominant mode of knowledge in this approach, but the work based competency model also recognises that the individual circumstances and environment of the manager are also important as pointed out by Driver (1990). The latter indicates that in terms of marketing planning, there should be adequate recognition of the variety of its forms and the manner and extent of its conduct.

Hill et al., (1998), recognise the point that there has been in marketing a quest for the pursuit of objective knowledge, coupled with the assumption that once acquired, this knowledge could be codified and transmitted in the classroom as universal laws. The suggestion of Hill et al., (1998), is that this has led to the split between practice and theory, where in fact there is clearly a need for these two areas to be integrated much more. This suggests an implied criticism of the technical rationality model. Learning it is argued, can be meaningfully derived from the actual experience of undertaking work activities (Hill et al., 1998). They argue that the potential for this type of learning has frequently been ignored by academics as a valid source of knowledge, because it raises questions about the authority of established modes of delivery. Alternatively, a work based learning approach examines what the student is doing in the workplace and then applies an academic analysis in order to obtain a better understanding of the situation.

For Hill et al.,(1998), a full work based learning approach recognises that there is a curriculum in the workplace. In the competency approach the student is put at the centre of teaching, by examining learning needs in the respect of their current workplace. Furthermore, an interdisciplinary approach is advocated and introduced, as it is argued that requirements in a work situation are not just reliant on a single discipline. Importantly, this perspective enables factors like judgement and interactions with others to be viewed as key attributes which need to be acquired by the learner. Cooperation between various parties is central to the successful implementation of a work based competency approach. This cooperation should exist between the academic staff and the employer organisation. Hill et al., (1998), point out that knowledge from one side should not be privileged over that from the other, as practice and theory need to merge and support each other. This approach obviously needs carefully thinking through, but is potentially very liberating.

Frequently mentioned in Hill et al., (1998), is McDonald (1989), and the barriers to marketing planning he identifies. A problem might be that by using McDonald's framework on barriers to marketing planning, a tendency towards universalism could emerge, suggesting that any alternative social constructions and perceptions of planning are seen as being somehow deficient, in the light of marketing's established knowledge base. In this framework some of the approaches to marketing adopted by the managers in this study would be rejected as they fall outside McDonalds generalisations, despite being successful. For example, McDonald (1989),

notes that a common problem in marketing planning is the existence of a confusion between marketing tactics and strategy. Given this context, it might be the case that any manager or trainee who adopts an alternative ontological view may find themselves highlighted as examples of marketing managers with limited knowledge. For McDonald (1989), traditional marketing knowledge is one important competency which must be exhibited. This paradoxically, could possibly come into conflict with marketing knowledge generated from experience.

McDonald (1989) places a conventional approach to marketing knowledge centrally, by stating that organisations must ensure that all those responsible for marketing in SBUs have the necessary marketing knowledge and skills for the job. In particular, he notes the central role of tools such as the product life cycle, portfolio management and the four 4 Ps framework. The problem here from a phenomenological, social constructionist perspective, is that if competencies are seen in the context of McDonald's framework, then this suggests that we have one over arching prescriptive and technically rational view of marketing. Importantly, McDonald (1989), directly refers to this lack of established technical knowledge in respect of marketing, by stating that this is a major competency deficit, at the very basis of the confusion between the marketing function and the marketing concept. McDonald points out that this lack of marketing knowledge reveals itself in the sense of managers having no real understanding of the marketing mix framework. However, in the analysis of the research for this study, a significant number of successful marketing managers do not use this conventional marketing mix framework. Instead, they constitute their own mix in the contextual spaces of their own organisations.

McDonald (1989), also identifies another competency where apparently significant failure occurs. This is the suggested inability of many managers to analyse and distil the intelligence needed to implement effective marketing planning decision making, from the vast amount of data collected. On the contrary, the study here demonstrates that marketing managers are not simply information processing entities. Many interpret the environment and act on this understanding using their own often unstructured and idiosyncratic approaches. Generally, most organisations of this study are successful as well, a point noted in chapter three. Among the other competencies required by McDonald are commitment, leadership, vision and experience. For McDonald (1989), commitment is apparent when there is a systematic approach to marketing planning present. Vision is about the entire marketing planning approach.



Again, this largely technicist view of commitment means that alternative approaches to conventional planning, like some of the ones discussed in this research, might be seen as being invalid and deficient. The issue is surely that if these approaches work in an organisational setting, then they have to be seen as valid reality constructs and not dismissed. On a positive point, McDonald (1989) does indicate that experience should not be neglected in the assessment of competencies, in situations where managers draw on it and learn. Clearly though, this experience has to be mediated by the traditional prescriptive approach.

Hill et al., (1998), indicate that a competency based programme was introduced by the University of Ulster, with the aim of assisting company managers to develop their marketing planning abilities. Students were expected to construct work books where records of decisions made were kept (Hill et al 1998). In the competency areas of knowledge, experience, analytical skills, leadership, vision, judgement, organisational ability and commitment, members were expected to focus on their strengths and weaknesses. In response to this, participants were exposed to methods which sought to develop the key marketing planning competencies. Importantly, there was a good degree of work based outside the prescriptive marketing framework, as shown by Hill et al., (1998). Participants were encouraged to discuss their own individual ways of doing business, where they were encouraged to relay their own experience and to experiment with new ways of doing things. This clearly represents a move towards a more practically based knowledge of marketing. It is argued that if the work based approach could embrace a social constructionist view of marketing, rather than being tied to the current prescriptive model, then it could represent a profoundly liberating approach to learning.

## **8.6. MARKETING PLANNING AS SOCIAL CONSTRUCTION: AN AGENDA FOR A PRACTICALLY RELEVANT, PHENOMENOLOGICALLY INFORMED KNOWLEDGE**

At a fundamental level, the implications of these last two sections is to suggest that a phenomenological approach to understanding marketing be adopted. It is one that holds an alternative view of epistemology and practice to the dominant model. What is being advocated here is a socially constructed knowledge, a knowledge that resides in common sense and thoughtful speculation. The suggestion is that marketing needs

divesting of its universalistic theory. Instead, marketing should be seen to be something that is produced within the local space of the organisation. It is this which should mediate marketing knowledge and not one technically rational model. The application of prescription is an attempt at constructive replication, where what might possibly work in one given setting may not actually hold in the future, due to relationships in the setting having changed. It can be argued that a phenomenologically informed social constructionism has greater utility for gaining a practical knowledge of marketing than much of the textually and quantitatively based research material has so far provided.

Planning texts, consultants and some research into marketing, reduce a heterogeneous practical realm into something that is generalisable and immediate. In fact, marketing thought and practice has been shown by the managers interviewed, to be open to many and varied interpretations. It has been consistently argued in this study that there are problems with the concept of people held by the marketing planning model, which are never really fully discussed in texts or in research papers. Marketing managers are seen as information processing, determined entities, dictated to by the various models of the marketing planning process. Any deviation from this is somehow seen as disfunctional. An example of this disfunctionalism is given in the research of Curren et al., (1992), into marketing decision making. They show that marketing managers go about making decisions, having 'self serving biases'. These biases, which could be argued are an intrinsic part of an individual's social practice, must be for Curran et al., (1992) corrected, in order to ensure the implementation of logical and objective planning procedures. The assumption here and elsewhere, is that marketing manager's activity must be apparently underpinned by a model of planning as an independently determining variable. This represents a flawed view of human activity in organisations. As this study shows, people, their perceptions and the language they use, are the focal point of marketing activity.

In this study, the marketing managers interviewed have drawn on different vocabularies to express and explain their views of the world. Importantly, it is language which constructs objects (Berger and Luckman 1966 pp49-61). This is a point that the different approaches to planning adopted by the managers here testify to. It can be argued that the conventional marketing planning models privilege a neutral describing language over the complexity of everyday language and meaning. As such, there is a degree of over simplification inherent in terms like 'planning' and

'strategy' which become reduced to technical issues. Marketing planning knowledge becomes then a code of technical managerial skill, devoid of context and people situatedness. The latter must be put back into the discipline.

Importantly, some of the previous work considered in early chapters, which draw on quantification and statistical generalisation, see for example Greenley and Bayus (1993), may have been very useful in setting out the issues relevant to the lack of use of marketing planning, but they actually shed little light on how marketing decisions are made. These studies neglect the importance of language in constructing marketing reality. Berger and Luckman (1966 pp49-61), point out that entities can assume a character of reality through linguistic use where social reality has a self constituting character. In this phenomenological approach, marketing is no more or no less than what managers say it is. While this approach may be viewed as being contentious, it does open up a very rich field for discussion, for interpretation and for careful reflection and scrutiny. This would serve important educational goals and arguably would be much more demanding of the learner, than the current over simplified generalisations of the technical rational model. The approach advocated here can be viewed as one encouraging difference, creativity, judgement and insight, factors on which practitioner success is built. Importantly, in this approach, what managers think strategy is, or what they think planning is, gets created through action and discourse and not through one technically rational model.

Marketing in practice emerges from experientially informed judgements. It is clear that in the interviews here, marketing managers do not always use standard forms of marketing discourse. This is not due, in the main, to a lack of technical knowledge, but because marketing is interpreted and acted on in a very localised fashion, using personal beliefs. Apart from one or two exceptions, there is little evidence of a relationship existing between the dominant mode of codifiable marketing knowledge, and the complexities of practical action. What marketing planning prescriptions do is to over generalise, failing to capture the grounded realities on which practice is experimentally based. Furthermore, marketing planning models suggest that managers can lock into an almost utopian vision of technical mastery over the unpredictable business world. Findings in this study suggest that managers are far too busy with the on going nature of their business to ever master this issue, a point made in chapter three by Robin Cawley of Nelson Universals.

## **8.7. UNDERSTANDING ORGANISATIONS QUALITATIVELY: METAPHORS AS ONTOLOGICAL AND EPISTEMOLOGICAL TOOLS**

The section following this one provides a summary overview of key findings, in terms of the metaphors used which help to explain the perceptions and actions of marketing managers. Prior to that, this section considers the basic epistemological and ontological perspective which can be seen to derive from the use of socially constructed metaphors. It has been suggested earlier in this study that the functionalist and systemic based substance of conventional approaches to marketing planning is clearly expressed in its focus on the interlocking of interrelated parts, such as linear planning sequences. In this scheme, marketing planning is portrayed in a systemic fashion, apparently revealing the structural causes of behaviour. Each set of marketing events that occur in the world, replicates a set of interacting patterns and systems, as in functionalist theory, (see Thompson and McHugh 1990 pp25-8). The identification of the relevant parts of the marketing planning system shows how the world works and what the nature of each marketing planning problem or issue is. In using this systems based approach, the implication is that there is one right way to master marketing planning issues. Whilst marketing processes might be hidden, they pre exist in the world as concrete structures (Ardnt 1985).

The focus on systems and structures means that there is a mechanistic and deterministic substance to marketing planning. In consequence, there is a neglect of issues such as differences in the interpretation of marketing problems and the individual understanding of marketing issues (Ardnt 1985). A corollary of the deterministic view of planning, is the assumption that marketing should be in the hands of an expert who knows how everything works, according to the dominant models. The latter become privileged over localised forms of understanding and action. A related consequence of the emphasis on structures and systems, is that marketing planning misses the essentially social and discursive nature of all organisational activity.

In the dominant model, there is little reference to the personal and intersubjective motives, interests and beliefs of people (Ardnt 1985). Neither included are the relationships which mark out organisations as communities composed of individual interpretations of reality which direct action (Brown 1992 pp157-164). Also missing

from the functionalist view is the situatedness of organisational and marketing life. What does marketing mean in a local context? How is the future seen in a planning context? How do individuals learn from previous practice? How is learning put into practice? The issues with which an individual deals with pertain to their circumstances at a particular time and relate to a set of factors as a person sees them at a moment in time. The evidence from this study suggests that marketing is a concept and a set of actions mediated profoundly by the exigency of a local, qualitatively understood context. Learning thus becomes a concept central to strategy development (Mintzberg et al., 1998 pp175-231).

It is argued here that knowledge of the world is enacted, with its basis in interpretative understanding (Alderson 1996; Daft and Weick 1984). This challenges the traditional functionalist approach to marketing planning. Instead of looking for problems and their resolution in systems and structures of knowledge, the focus shifts to one concerned with engaging with how people constitute their understanding, in order to explain what is going on. Using an interpretivist perspective, it can be said that what people know is how they see. Knowing and learning is not simply about accumulating and storing knowledge about marketing planning models and theories, or just about building up facts about marketing. This notion derives its meaning from the world view that gives us marketing as a complete system, when in fact people understand differently, where perspectives are personal. Futures are shaped not by linear marketing plans, but by what people learn in the course of time, then act on incrementally, through relationships with others. The future is open and yet to be constituted by the activities of people. Reality is not to be found in abstracted systemic models, but in the discursive, interpretive and communal nature of organisational life.

Central to this study has been the socially constructed metaphor so it useful to reflect again on the value of this, in terms of the interpretative process adopted here. In order to make sense of the environment around us we draw on pre existing knowledge and this is what metaphors do. For Shankar et al., (2001), metaphors represent one of the main types of human argument, having a central place in the explanation of events. Metaphors have been shown here to impact on managerial practice in the form of symbolic constructs, where the practitioners world is constituted as a network of subjective meanings (Smircich 1983). Metaphors are ontological, as they relate to the world of being. Metaphors are as Morgan (1996) points out, inevitable. Language is pervaded by metaphors, and they are impossible to

avoid. Metaphors are epistemological as well, because they represent a way of viewing the world (Ardnt 1985). They enable us to transfer information from a relatively familiar subject, to a new and relatively unknown subject. In asserting that subject a is like b, a process of substitution and comparison is taking place, where the interaction between a and b generates new meaning. As a result, new discursively accomplished perspectives on the world come into being. More particularly, it is argued here that new theoretical perspectives on marketing can be generated by using metaphors as frameworks of understanding.

Prange (1999), suggests that metaphors can liberate the imagination hence they encourage varied perspectives for understanding organisations. In this study it has been possible, using metaphors, to show the complex interpreted nature of organisational life and the limits of much traditional marketing planning modelling. In contrast to established marketing theory, the strong implication here is that practitioners and academics can be encouraged to develop the ability to read social and marketing situations through the alternative 'spectacles' of qualitatively based metaphors. This phenomenological argument suggests that reality has been expressed in this study through socially constructed language and a variety of symbols (Witkin 1999). No unique real world of marketing pre exists independent of human mental activity and people devised symbolic language.

## **8.8. MARKETING AS A LOCAL FORM OF KNOWLEDGE: THE METAPHORS OF PRACTICE**

In this section, the findings outlined at the end of chapter four are dealt with in the context of the metaphors which were used by respondents. The intention here is to provide a broad framework for distinguishing what the metaphors reveal about marketing planning, before taking up a more detailed discussion of these same metaphors in the context of new theory development in marketing. This area will be central to the final chapter. For Van den Bulte (1994), metaphors can be used as a method to stretch the mind, in ways that broaden and lateralise thinking. Metaphors can be seen as tools enabling us to give compact descriptions of complex phenomenon and importantly, to share tacit knowledge that cannot be easily transmitted using literal language. The preceding three chapters in this study have had metaphors at their centre, where they have been used analytically, in order to

understand the marketing managers life world from a phenomenological perspective. In terms of understanding, Morgan (1996), indicates that we have only the most partial of insights into the fundamental metaphors that underpin organisational action. Marketing meta theory is abundant with metaphor. There is however, as with general organisational inquiry, a paucity of research into metaphors in actual use by practising managers. Morgan (1996), points out that empirical work is needed to isolate and make transparent the metaphors and groups of metaphors prevalent in the discourse in organisational settings.

This argument can be applied with equal weight to marketing. This research has tried to redress this situation, by examining the metaphors that some marketing managers use and the implications of these same metaphors for understanding marketing practice in a range of organisations. In this study, the important themes in the research were grouped under key metaphors, which acted as a means to organise the material into coherent sections. In each section, one metaphor, used by one marketing manager, was taken to represent the essential findings. The metaphors that were selected acted as qualitative, explanatory tools and whilst all the managers did not share all the metaphors, the latter facilitated and deepened a phenomenological understanding of the way in which they approached and made sense of marketing planning activity.

In chapter five, the first two metaphors were of a maritime origin. The first one, 'big tankers and little flotillas' introduced the organisations of the study, depicting them as successful and varied, in terms of type of market and type of organisation. The next section and next metaphor was about 'navigating the tankers and the flotillas'. This dealt with the very individual definitions of marketing that managers brought to their roles. Importantly, it was noted that in this study definitions were indexically linked to the specific contexts and situations in which the marketing managers operated, which is a central feature of ethnomethodological analysis (see Benson and Hughes 1983 pp99-127).

The third metaphor deployed was about 'iron filings and magnets' which built on the individual definitions of marketing perspective. For du Gay and Salaman (1992), the work organisation is now about the culture of the customer, a way of thinking and acting which has supplanted previous bureaucratic structures. They point out that environmental change, driven by post Fordist consumers, demanding differentiation,

has fundamentally altered the discourse of the firm. Issues raised here in this section, were about the diverse cultural perspectives on marketing that exist in some of the organisations of this study. The cultural configuration of an organisation clearly assists in determining its type and level of marketing response and is central to implementation issues. Here Weick's (1995 pp18-24) notion of individuals forming their work place identity through interaction with others, is significant, in terms of indicating that sense making in an organisation starts and ends with people.

The fourth and fifth metaphors are concerned with how marketing managers perceive the general business and market environments that they operate in. These metaphors are both about 'building pictures' suggesting that the marketing managers in this study create their own environments. Perceptions of reality are not bounded by the dictates of what the prescriptive literature says it is, but by the ways in which managers construct and enact it (Smircich and Stubbart 1985). As artists create their own pictures, so marketing managers make their own environments. With the wider business environment and with customers too, it seems clear that what information managers collect and work on is fundamentally based on localised and contingent knowledge (Boden 1994 pp193-8).

In terms of managers use of the analytical tools, the sixth metaphor, of marketing planning as 'religious rite and ritual' proved to be useful in capturing the complexity of the issue. No one general theme emerged, with half of the managers using the tools and the others not. For those who used them, the tools were felt to be helpful orientating devices. Like the role of religion, the tools provided for some a guide to action. There was warning here from one manager who uses the tools however, not to get too dogmatically attached to them. Another pointed out that they are helpful in directing some thinking, but beyond that, marketing is about local contexts and local action. It was suggested that the use of the tools could be likened to a religious ritual, providing for participants a way to reduce anxiety and engender feelings of control. For those managers not using the tools, decisions about marketing begin and end within a highly localised context where marketing decision making and action is about things like conversations, tacit knowledge and on going relationships.

The seventh metaphor to be used is about marketing managers being 'beyond the slavery of the four Ps'. Few managers appear to structure their marketing plans and efforts around this framework. In keeping with their individual definitions of marketing,



the versions of the marketing mix they adopt is varied and highly context dependent. For one manager, Irving Wallace of Jenkins Print, the conventional marketing mix of the four Ps is regarded as being too simplistic, failing to take into account the complexity of his product offering and relationships with customers. This study shows that marketing managers are to a considerable extent a long way removed from a state of slavery to the four Ps. They articulate clear alternative conceptions to the traditional form of the mix. It is apparent that in a range of industries and markets, what constitutes the idea of a marketing mix, is radically different from that which is perpetuated in mainstream theory.

This leads into the next metaphor, the eighth, which is about the role of relationships. One respondent commented that they are so important that, otherwise we wouldn't have families and we wouldn't have friends'. Here relationships are tied in closely to quality and service issues, and are seen as central to the marketing offer. The social activity metaphor is clearly the source domain and this is targeted on to the domain of marketing where overwhelmingly, local relationships are an important strategic focus for most of the marketing managers here. The ninth metaphor is 'marketing as a black art' where it is clear that the marketing plans which are written, conform to a local logic. The plans are idiosyncratic, dominated by contextual issues related to the way in which the members of the organisation perceive and act on their local environment.

Generally, the plans discussed here do not bear a great deal of resemblance to the prescriptive marketing planning literature and there is evidence of tacit knowledge being strongly linked to marketing expertise, in much the way Hackley (1999) suggests. The marketing processes these companies use in this study, might be regarded as being 'sloppy' by Leppard and McDonald (1987, p1), only because the plans they have written stand outside the dominant prescriptive model. This approach does not appear to have effected the success of these firms however.

The tenth metaphor is about 'armies hills and battles' which is about the issue of creating strategy. This metaphor suggests that organisational members derive strategy not from the contents of marketing plans, but from an appraisal of the opportunities inherent in day to day action. Here, two of Weick's notions related to sense making are of relevance. The first is related to the 'on going' aspects of activity in organisations, where managers are always in the middle of things. In the midst of a

battle, an army can only make sense of what to do next, on the basis of what they have done in the past, by going to the next hill and looking back. This is the idea of retrospect (Weick 1995 pp24-30). Marketing opportunities present themselves to managers as part of on going activity and out of existing local circumstances, strategy emerges as an going sequence of events and not out of pre programmed plans. As Hackley (2001a p138) notes, to have a strategy means to have a purpose and these for individuals and for organisations, are often reconstructed, reinvented or made up as we go along.

The eleventh metaphor draws on another maritime theme, that of travelling by water, where it is important to get the right crew 'on board', so the journey can be successfully accomplished. One of the ways in which marketing decisions are made in an emergent way is through relationships and networks. It is at Nelson Universals that Robin Cawley talks about making sure that key players are 'got on board' meaning the retailers who sell his financial services products. Having these 'crew members' in place, means that they are working for the success of the whole 'sailing' enterprise. This situation applies to other organisations in the study as well, where relationships with a variety of key players is central to the continued successful development of business. Out of these relationships, decision making takes place in situations typified by spontaneity and reactivity as Gilmore (2001) indicates.

Weick's (1995 p44) notion of 'throwness' is also apt here, organisational members face multiple relationships where problems and decisions must constantly be made. People must deal with what comes up and this rarely takes place in the context of formal plans. The twelfth metaphor is about 'getting into other peoples shoes' which is also about relationships, where decision making occurs not through formal planning procedures, but through the mechanism of talk. Here, a 'reciprocity of perspectives' means that managers are constantly trying to fit their agendas into those of others, in order to ensure mutual adaptation and adjustment in the process of making marketing decisions. Through the process of talk, organisational relationships are sustained where language makes action meaningful (Marshak 1998).

The next metaphor, which is the thirteenth, deals with the issue of tacit knowledge. It is argued that a significant number of respondents adopt an intuitive approach to marketing decision making. Managers don't literally have 'a nose for what's right and wrong' but this metaphor captures the dimension of the unarticulated, the issue of

knowing more than can be said. Tacit knowledge is as Mintzberg (1987) explains, a sensing process where intuition plays an important role. Knowledge is often personal, subjective and based on gut feelings as Damasio (1994 pp165-201) suggests. For Hackley (2001a p93), it is difficult to tell people how to do practical things without them having the direct experience or observing, or without the necessary trial and error. For Hackley (1999), in marketing as in other business areas, there is a necessary and large tacit dimension, a proposition supported by the findings in this study.

Significantly, managers are found to rely on intuition and judgement in making marketing decisions. The area of tacit, intuitive decision making takes on increased importance when considered in the context of new post-modern social conditions. While authors like Ritzer (2000 pp21-39), argue that the large multi national organisations are making business and society more amenable to the forces of rationality, others recognise the existence of new forms of fragmentation and diversity, where irrationality and flexibility is the rule. From the viewpoint of post modern consumer behaviour (Firat et al., 1995), it is clear that a number of managers in this study appear to recognise this change. Lacking clear guiding principles of operation which accompanied the certainty of 'modern' times, they are making their marketing decisions on intuitively based judgements (Fifield 1998 p301).

The fourteenth metaphor attempts to capture the complexity and throwness (Weick 1995 p40) of managers jobs, where immediate issues are usually the priority. Much of the job is about 'fighting alligators'. This revolves around dealing with one pressing issue after the next. In this context, there is less time to develop long term plans. This finding assists in confirming the notion that much decision making is based in emergent on going situations, rather than in abstract strategic plans. The final metaphor, the fifteenth, is about 'bullseyes and rudderless ships'. The marketing plans written by the marketing managers here, are not closely followed as has been made clear by the sections dealing with emergent decision making. They are there, instead, to guide and to orient organisational members to what needs achieving and consequently have an important role to play. The notion of rudders as guiding mechanisms and bullseyes to help the aiming process, are metaphors which are suggestive of this orientating process. The plan enables organisational members to extract cues, providing images of where they wish to go in much the way that Weick (1995 p54) suggests.

Shankar et al., (2001), suggest that it is time marketing escaped the dominant Kotlerian war metaphor of strategy development. They argue it should be replaced with alternative metaphors of a more persuasive power. It can also be argued that it is important to try and escape from many of the other standard marketing metaphors that are still in use, ones which reflect the assumptions and theory of the traditional model. Most metaphors outlined in this section do move away from the war analogy, an approach which has dominated much marketing thinking over the years (see Hunt and Menon 1995). This perspective can be seen as being generally representative of much current marketing meta theory, which allows little space for interpretivism. In order to place a qualitative approach more centrally, the challenge here is to use the socially constructed metaphors discussed in this section to help to develop new perspectives on marketing plans and planning theory. This challenge is regarded as a very important one and is taken up in the next and final chapter, where a revised planning process and plan is recommended, based around the idea of a 'strategic marketing signpost.'

## **CHAPTER NINE**

### **NEW MARKETING PLANNING THEORY AND THE STRATEGIC SIGNPOST**

## **9.1. MARKETING PLANNING AND ACTION LEARNING**

This chapter is concerned with making recommendations which emerge from the findings of this study. In the opening two sections here, action learning and action research are reviewed. The recommendation is that these two approaches become central to learning about marketing. Both are compatible with a social constructionist phenomenological view. Action learning and action research develop the key issue of learning which was raised in the previous chapter. These methods provide an alternative focus to the technical rational model of marketing planning. As has been argued, much marketing is learnt in the context of a community of practice and action research and action learning facilitate the acquisition of this practical knowledge. The main substance and discussion of the recommendations follows on from this, where a new theoretical perspective on strategic marketing planning is articulated. This is then followed by a recommendation for a revised style of marketing plan, in terms of both construction and presentation. The new format is discussed and an example included. A managers feedback on the model is also included.

Action learning emphasises learning by doing (see Kable 1989). Margerison (1988), indicates that it was Reg Revans who developed the notion of action learning. His work started in British Coal mines after the second world war. It was thought at the time that there was a great need for increased coal output from the mines and it would be inappropriate to take managers away from the collieries to train them in the skills of managing. Being too valuable a resource to sit in classrooms, they had to stay in the colliery (Margerison 1988). The logic was that managers should learn from their day to day practice. The problem was that the mine manager could not learn from other managers, unless they had some understanding of each others situation and the opportunity to share and compare what they had learned. This is the key foundation of action learning and it represents a departure from the teaching of prescriptive theory. Mumford (1991), recommends that the best form for action learning is for participants to work on a defined topic which is significant to the individuals themselves and which results in effective action. People learn from experience, share that experience with others and have those colleagues criticise and advise. This is termed as the 'comrades in adversity' approach to learning (Margerison 1988 p43). Alternatively, Mumford (1991 p37) calls it the 'fellows in opportunity' approach. This becomes the basis for assessing how to improve ones own individual skills and the tasks which have to be performed. McGill and Beaty (2001 p16), have used action learning for part time students on academic and professional courses, for full time students to support project work and for the study of issues within organisations using employees.

Some action learning approaches see the curriculum being provided by experts, with the learner then drawing on their experiences in the work place (Jones 1990). It is essential to proceed with a view on action learning that derives from a social constructionist perspective, otherwise the programme content could become reified. In this context, Margerison (1988), discusses the 'P and Q' elements in the traditional action learning approach. In traditional marketing programmes, the programme knowledge tends to come from a tutor who is assumed to be an expert. This programme knowledge represents the codified marketing theory of the prescriptive genre. In implementing action learning, it is important to ensure that the programme knowledge does not dominate and is not viewed as being the last arbiter of marketing problems and issues. Earlier in chapter eight, this was argued as being a major problem with a competency based approach, where learning about marketing was mediated by prescriptive frameworks.

There needs to be a constant provisional element to what constitutes expert knowledge, so as to ensure that a practical workable understanding is seen as being central input to the development of marketing pedagogy. Marketing theory should become more divergent, where it is developed out of the experiences of practising marketers. This knowledge needs to be articulated and textually presented, so as to provide a series of competing perspectives for action learners to examine and reflect on in the context of their own experience. One such new perspective is discussed later in this chapter. Managers would then work on marketing problems and issues which are relevant to them, in the context of a programme knowledge which represents a number of different ways of seeing marketing. To lessen the chance of the reification of programme knowledge Mumford (1991), suggests that the 'Question' is put before the 'Programme', where course participants start with their job role and not with the analysis of others work.

In an action learning programme, the metaphors used by marketing managers and staff could provide important insights into the nature of problems and their possible resolution. In an action learning context, Margerison (1988), argues that the philosophy and methods of learning have got to get close to the managers life existence and reality. Here the metaphors that managers use could be explored in order to get close to that life existence. What metaphors do effectively, is to link thought and action, as has been shown in this study. Potentially, all the metaphors discussed here could be used in action learning programmes to stimulate debate. In a learning situation, getting learners to use diverse metaphors to explain action, could

mean that a conscious pluralism is encouraged. This conscious variety would facilitate critical discussion amongst action learners, producing an agenda enabling managers to confront different perspectives, provided by the different metaphors in use.

This approach would overcome a criticism of the use of metaphors, which suggests that to restrict the ones used, will inevitably lead to the suppression of certain viewpoints (Morgan 1996). The metaphors marketing managers use in their everyday settings, uncovered by this research, have helped to clarify what is actually going on in these organisations. These metaphors also help to shed light on what is happening in other organisations as well. This general approach could inform future course designs based on action learning programmes. New and different perceptions, based on other metaphors, could indicate new paths of action. There will always exist a variety of interpretations and no metaphor can ever bring the final answer to issues and problems. This apparent limitation is in fact the metaphors strength. For Morgan (1996), the metaphor invites opposition and its own deconstruction, where it acts as a catalyst for future development.

In practice, action learning involves a collection of people known as a set, who work together for a compact period of time. In terms of how learning occurs, or what can be termed as the learning cycle, action learning involves experimentation, which is doing the job, or dealing with the problem. This should be accompanied by some reflective observation of the experience by the learner. These two related aspects of learning can then be brought together perhaps in a different location, where abstract conceptualisation can take place. Following on from this, it would then be possible to test the implications of these concepts in new situations. This broadly follows Kolb et al., (1984 p38) model of the learning process. In sets, each member takes action on their own issues after reflection with the group. The project which a set member brings to the group clearly has to be live, so that people can undertake action to further real issues or resolve real problems.

Sets can have a facilitator. The role of the latter is to ensure that all the individuals in a group work together, so that each person's issue can be pursued. McGill and Beaty (2001 p30), point out that set members should listen to an individuals problem or issue and a supportive discussion should then result. As a consequence, individuals can go away and then work on their particular project. At the next set meeting, the implications and effects of action can be discussed. The intention of a phenomenological perspective is not to be prescriptive about what could be looked at, but it is clear that a number of marketing planning issues could be considered in action



learning sets. For example, it is important to attempt to unravel where possible elements of tacit knowledge in organisations, as it contributes in an important way to marketing planning (see Hackley 1999; Bauman 1999 pp52-77). As a further example, the study of the marketing mix components of the marketing plan could be examined. Different types of mix could be compared and evaluated. These type of learning activities could also be completed entirely within an organisation, with groups of employees.

As an example drawn from full time study, students on an action learning project could be assigned to different companies and asked to prepare a new marketing strategy for that organisation. The module could be called Marketing Decision Making: an action learning approach. This module could be carried out after earlier modules in marketing had been completed. Students could be put into small groups and be asked to make contact with a local company with a view to a) carrying out market research and then b) asked to write a strategic plan for new or improved product or service. The tutor would act as a facilitator. All groups could meet up regularly as a set to discuss progress and issues. The tutors role would be restricted to a supportive one. It should be made clear that students have to develop their own approaches to issues, drawing on their own resources. In this way, new approaches could be encouraged and developed which might move away from the technically rational model, to one which uses students own social constructions of situations. Certain 'contractual' outcomes would need to be specified in advance, for example, a statement about the completion of a marketing plan. Also, students would keep a portfolio of work done and a diary of events. At the end of the module, the research and the plan could be presented verbally and in written form to the sponsoring company. Students could also complete a reflective statement on what they felt they had achieved, which could then be assessed along with the other materials assembled during the module. This type of approach could also be used with a large group of students as well, with each set participant being asked to deal with an action learning issue relevant to marketing.

This type of learning framework could be adapted to other types of courses or programmes. Current professional, post experience courses in marketing, like the Chartered Institute of Marketing's Diploma, could also benefit from placing a greater emphasis on this approach. At the moment, these type of courses codify the past and present a prescriptive view of marketing knowledge and theory. All the new marketing insights gained from action learning sets could be compared, in a variety of ways, with other new or established theoretical approaches which form part of the marketing knowledge base. These theories could be used by facilitators to introduce new action

learning sets as the basis for future study. The nature of learning, the issues set members bring and the nature of social interactions in the sets, cannot and should not be specified or accounted for in advance. This means that the action learning process enables a local and socially constructed knowledge of marketing to be worked on and debated. As Addleson (1996) notes, in the interpretative organisation, much of what happens cannot be planned for. This represents a major departure from marketing knowledge based on the technical rational model, where it is assumed that marketing problems pre exist outside of consciousness, to be resolved by a universal theory. For Jones-Evans et al.,(2000), the whole process of action learning represents the development of a new paradigm in business education.

## **9.2. ACTION RESEARCH AND MARKETING PLANNING**

For Laurent and Pras (1999), there is need for marketing academics to put more focus on real problems. This thinking is given a suggested approach by Brief and Dukerich (1991), who advocate that more practicality in theory can be obtained by adopting the process of action research. Action researchers can be either in house or external, where the central focus is on the practical concerns of people in an immediate problematic situation (Gill and Johnson 1997 p59). There is actually very little work of this nature presented in the marketing journals, indicating that the model of research which is dominant still rests very much on the natural science mode of inquiry (see Gronhaug and Olsen 1999). It is argued here that more marketing academics should adopt the roles of action researchers, rather than being as they are at present, the definitive assessors of marketing activity. Instead, actions taken will be based on speculation and analysis of a particular situation, rather than with the testing and verification of a hypothesis. The focus is on solving a practitioners problems, using a divergent knowledge base to offer up ways to move forward. Ardnt (1985), refers to this as the liberating paradigm, where what passes for reality is socially created and maintained.

There exists in the action research approach, little concern for the development of universal theory. Action research is not driven by abstraction, but by the problem in hand, as suggested by organisational members. Work which is conducted is particularistic and context centred, demanding the researcher to have contact and interaction with clients. As such, this represents an opportunity to develop specific theories of marketing in action. It can also be viewed as a departure from the traditional idea of research, which is to see it as distant and objective (Gronhaug and

Olsen 1999). The intention is that by being enmeshed in the local context of an organisation, a theory is developed by the action researcher, which can help the local practitioner. This should be a practically useful, rather than a prescriptive theory.

In the research study reported on here, each manager can be seen to approach marketing action differently and as a consequence, the marketing planning problems they experience are different as well. An action researcher could evaluate these problems and offer up new ideas based on the managers individual situation. The development of theory in this context, has to be viewed not as a set of interconnected generalisable prescriptions, but as helping to provide concepts which can alter perceptions and suggest new paths of action. In a marketing context, it is often assumed that the actions of managers should proceed because they are supported by certain, verified laws, a view largely incompatible with the action research approach. Articles appearing in marketing journals, written from an action research perspective, might mean that academics would overcome the problem where they are seen to be writing only for each other and not for practitioners, see McKenzie et al.,(2001).

As Marshak (1996) has noted, metaphors structure and mediate meanings and responses. At the centre of the action research project there could be the socially constructed metaphor, used for diagnosis and for intervention. Through the metaphor, images of data can be generated where they are attached to phenomena to shape and interpret events. Morgan (1996) notes that metaphors can be the focus of action research. An example of this is the work of Clegg et al., (1996). Acting as consultants to the Australian government, they examined Australian leadership and management needs, utilising a form of action research through metaphors. The emphasis was on an examination of the talk embedded in organisations. Focus groups were the main empirical approach used. The resulting report to the Australian government was structured around the various metaphors used by organisational members. Similar approaches could be adopted in marketing, in terms of the investigation of issues as diverse as new product development, marketing strategy, planning and branding. Additionally, the deliberate use of metaphors in action research could offer another way out of the cage of thought and language which has been constructed by the dominance of the technical rationality and systems paradigm in marketing.

In terms of doing action research, at the entry stage of the action research project, it may be either the client or the researcher who takes the initiative, in presenting the problem. There should be then subsequently, a close collaborative relationship where there is mutual agreement at each stage of the research sequence. Following entry,

there is contracting, diagnosis, action recommended, evaluation and then the researcher will withdraw from the problem (Gill and Johnson 1997 p63). In terms of this study, a marketing problem connected to planning that could be worked on using an action research approach is the one raised by Melissa Jones of Tucker International. Here, the issue is related to marketing orientation. The interview held with her indicates she is attempting to ensure that the staff on the production line become convinced of the importance of the role of branding.

In addressing this, an action researcher would need to specify in detail the nature of the marketing orientation problem and contract with the company in terms of identifying what is required as to the outcome. Action research in the organisation could involve the carrying out of in depth interviews, observations, the examination of documents and the execution of questionnaires. The researcher could also become involved in the work processes of the organisation, by taking on a particular role. After sufficient research had been completed, a diagnosis could take place and then action could be recommended and implemented. An evaluation of the success of the course of action could then be done. Action recommended might involve one or several activities. No universal theory is drawn on, and it could possibly mean a greater debate in the organisation on the role of marketing, altered styles of decision making, or additional staff development.

Again, as with action learning, it is very important to point out the dynamics of these situations and prescriptions for dealing with issues, cannot and should not be specified in advance. The recommendation is however, that more action research in marketing is undertaken. It has a strong compatibility with phenomenological social constructionism and could contribute significantly to marketing knowledge development. Having considered the issue of learning in these two sections, recommendations now turn to the question of new theory development and practice in marketing planning. In later sections, both action learning and action research emerge again. This is done when it is considered appropriate to suggest a learning programme based on some initial theoretical insights.

### **9.3. METAPHORS, MARKETING PLANNING AND NEW THEORY**

The intention at this point is to discuss a series of theoretical conjectures about marketing planning using the metaphors of the study to ground explanation. It is argued here that the theory discussed will add to knowledge, by attempting to reshape

the ordinary, commonly held beliefs of those in the wider business and marketing community about strategic marketing planning. The intention here is not to produce factual answers, but to raise theoretical issues and questions that promote further thoughtful deliberation. This draws on an interpretivist approach to theory generation (see Prange (1999; Brief and Dukerich 1991). Willis (1977), provides a good example of the discursive nature of qualitative theory. In this study, evidence and argument is being produced as theory, not fact and proof. This means that the theorist can supply visions for future action. It is important to note therefore, that in this study, metaphors have served two purposes. Firstly, they have been used as organising themes for the analysis of the interviews in chapters five to seven. Secondly, these same metaphors are being used in an extended way, as theory generating devices. Miles and Huberman (1994 p301) note the extent to which we think narratively and figuratively, using metaphors and tropes.

Some discussion of the important role of metaphors in generating theory has previously been written about in chapter three. It was pointed out that metaphors as theory can help to generate new knowledge of marketing planning in order to offer up ideas to practitioners. A practical theory see Brief and Dukerich (1991), can be seen as an educational device rather than as an interrelated set of prescriptions formed to solve managers problems. The world is not certain and what the practitioner requires is that they can develop approaches applicable to their own situations. The focus here is on describing and explaining, where there is a concern with process rather than predicted outcomes, where the theorist is akin to being a question framer, rather than a question answerer. As this is a phenomenological study, the intention here is not to produce any prescriptive, covering laws about marketing planning, but to describe and explain meaning and action in local contexts (see Miles and Huberman 1994 p8). The particular theory that is produced here, should enhance our understanding of the process of marketing planning in organisations, by drawing on the descriptions of the lifeworlds of managers.

Marshall and Rossman (1999 pp25-28), argue that the process of much qualitative research can be captured by Shiva's constructivist circle. Shiva is the Hindu god of dance and death. In this schema, the researcher enters a cycle of interpretation, ensuring that primarily, there is sensitivity to context. No attempt is made to look for any final truths. The whole research process begins with the design of the study, to be followed by data discovery, interpretation and analysis and then explanation and theory. Finally, experience will either confirm or show that there are anomalies in the explanations offered (see Rossman and Marshall 1999 p27). The latter point out that

the researcher must be faithful to the 'dance' but should stand apart from it, discovering in the process, participants meanings and symbol usage. In the context of this study, the symbols are the metaphors used by the practising managers as they go about explaining the meanings attached to the process of marketing planning. Other studies in other contexts may discover other truths, but this should add to the richness of marketing theory. In this context Hackley (2001a p171), indicates that knowledge about marketing,

"...can then be seen as something to be evaluated, compared, considered, reinterpreted, always shifting and infinitely contestable, divested from a unified sense of truth yet with a truthful integrity."

What is being proposed here is theory drawn from a number of local contexts. It is argued that there is real meaning and relevance in the views of the marketing managers that have been the subjects of research here. From the research, theory can be developed. Hackley (2001a p170), argues that dominant views of marketing, which incorporates technical planning and strategy, trades on a practice talk that is largely mythical, disintegrating a diverse domain into a simplistic rhetoric. This study suggests that this perspective holds considerable truths. The case is that much of the theory to be discussed in the following section not only pulls on a wider knowledge base than much traditional marketing, but also engages more fully with the complexities of practice. Here, in this context, the marketing theorist comes close to being an 'ontologically unstable assimilator' as described by Hackley (2001d p1187). In the next section, the approach to theory development differs considerably from the standard model. It is recommended that the theory discussed below be taken as providing new insights into an area that is often taken to be homogeneous, reducible in texts to an explicit and codifiable knowledge. The reality of marketing planning moves away from this naive perspective.

What is being presented below then, is a theoretical and analytic framework (see Hammersley and Atkinson 1995 p257). This analytic frame is grounded on the data of the research, in order to ensure that a proper conceptual development of the subject matter takes place. Here, the intention is to take the textual material of the research interviews and ensure that they are adequately 'elaborated' (Hammersley and Atkinson 1995 p257). For Hammersley and Atkinson, it is not enough in any qualitative research project just to report particular stories or events. This represents a further argument for the establishment of an analytic frame. In the context of this study, the analytic frame is represented by the metaphors that have been used by various marketing managers and as such, are a major departure from the way in which

planning is usually written and talked about.

Simon (1994), notes that managers are very valuable sources of research, conveyors of an understanding that is rarely exploited in research into marketing. In this study, it has been possible to interpret the different metaphors used by managers to provide a broad framework for understanding what they mean in terms of how people think and how they act. Understanding others perspectives is essential if practical knowledge is to be advanced. Interpretative metaphors as theory help in this process. Engaging in discourse about metaphors and their meaning is about attending to the arguments of others. This may assist managers in coming to understand things differently, by opening up new visions. This suggests that the cumulative model of marketing planning is a flawed one, being based on a view of individuals which sees them as being mere properties of a system perpetuated by an unproblematic language. As well as providing theoretical speculations which attempt to explain action in the organisations of this study, some recommended courses of action are made, in the context of Brief and Dukerich's notion of a practical theory that offers managers 'ideas'. In the next section what is being theorised is the practical, everyday understandings of those who manage marketing (see Hackley 2001a p12). This is a very important section which brings together findings and analysis to form a discursive theory which is the precursor to a recommended new approach to marketing planning. While a significant amount of marketing theory based on research is terse and propositional, this is not, due to its qualitative form. Following the next section is a summary table. This shows and summarises the metaphors of this study as theory, linking them to the idea of a new approach to planning, which is represented by the 'strategic marketing signpost'. This 'signpost' is discussed later in the chapter.

#### **9.4. MARKETING PLANNING AND THE ANALYTIC FRAME: DEVELOPING NEW THEORETICAL PERSPECTIVES**

To be considered firstly, is the definitions of marketing that these managers work with. It is out of these perceptions that a socially constructed reality flows, informing all the courses of action taken. Definitions set the scene for action, which can be worked out by communities of practice and then reshaped to meet changing circumstances. Definitions of marketing are dealt with by the metaphor used in chapter five, which is about 'navigating the tankers and the flotillas'. This shows quite clearly that managers do not operate with one definition of marketing. As with the sea, there are many

different types of craft on it. The metaphor itself suggests difference, in terms of aims, journeys and resources. The definitions here show that marketing is about a locally constructed common sense behaviour. Factors like experience, knowledge and judgement tells these managers that to be profitable, they must meet customer needs. How this is done is worked out locally and in a largely successful way, by most of the managers in this study. Robin Cawley of the financial services company Nelson Universals talks about marketing as being about the 'common sense' behaviour of employees as they go about meeting 'customer needs'. Common sense behaviour is of course not monolithic and can vary from organisation to organisation. Marketing must be worked out in a social context, where organisational members operate either in the presence of others, or with their knowledge. These organisational members have to determine what are plausible courses of action to take in order to meet customer needs, with a view to making a profit as Robin Cawley points out. To use the notion of common sense behaviour frees individuals from the tenets of prescriptive theory and suggests that each organisation can seek this goal in its own way.

At Mitre Technics, Gordon Willis adopts a similar common sense view of marketing which is also grounded in the meeting of customer needs. He indicates marketing is about following customer contracts. This means doing what customers want. For Guy Martin of the media K consultancy, marketing is anything the customer wants it to be, which is good sense making, if the consultancy wishes to be flexible in doing business. For some managers, marketing is very much about selling. These managers do not however adopt a naive hard sell approach. Common sense tells them that they must identify what their customers want - which is arguably good selling anyway, otherwise customers will not return. Basing decisions on experience and judgement means that managers intuitively know what the appropriate course of action is. Jason Hobart of Stirling Publisher says marketing is selling the company to clients, but he goes on to say that this involves understanding what the customer wants. Another view of marketing that grounds it in common sense, comes from Irving Wallace, who points out that its about a long term view. Without an eye to the future, a company can be caught out. The implication for practice is that marketing managers and their teams must determine in a local context what customers needs mean and work out what types of strategies will meet these needs. Here an action learning approach could bring together different organisational members into sets, to work on the problem.

In chapter six, the last metaphor is about 'marketing as a black art', which deals with the local logic of the plans discussed by the marketing managers. This reflects a locally worked out approach to marketing dealt with above, where organisational



members have their own common sense view of marketing and planning. Virtually all marketing managers here write plans and it is clear that plan writing is universally supported as an activity to be undertaken. The key issue here is that the nature of the plans that are written bear little resemblance to the prescriptive literature. This cannot be simply reduced to the issue of saying these companies have got it wrong however. The very first metaphor discussed in chapter five about 'big tankers and little flotillas', indicates that the wide range of companies featured here are mostly very successful. The marketing plans that are produced here vary quite considerably. Some are sales forecasts, others like the one produced by Paul Peters of Earlham Newspapers, is fairly extensive, dealing with issues of service strategy, brand extensions and the wider area of information technology support and human resource strategy in relation to marketing.

For Roy Sands of Jenkins department store, there is considerable local detail in his plan as he talks about factors to be included like cosmetic house promotions, spring and autumn 'offensive' strategies. At Media K the marketing consultancy, the plan is said to be rather unusual by Guy Martin the managing director. It does not contain the four Ps, is discursive in nature rather than bullet pointed and is speculative about the type of markets the organisation wants to be in. What this plan and the others reflect, is the very local logic inherent in their construction. The unifying feature of all these plans is that they are based within the indexical understanding of marketing managers, bearing little similarity to the conventional model. This local logic means plans are about locally known environments, where a knowledge of the latter is gained principally through experience. Here, the action learning or action research approach could be adopted in the construction of a marketing plan, where organisational members could be set the challenge of analysing their local business environments, with a view to constructing a plan out of that reality. The nature of this local plan is likely to vary considerably from the conventional model. The point here is that plans can be different, yet successful.

The next issue to consider is one related to culture and the construction of shared beliefs in organisations. Importantly, in thinking about marketing planning, notice must be taken of the factors which support the playing out of meaning and action in organisations. This makes possible the working through of the definitions and plans discussed above. Organisations can be seen as precarious structures of meaning, a point often dealt with simplistically by much textual material on marketing planning. The metaphor that deals with the area of culture is 'iron filings and magnets' discussed in chapter five. This metaphor draws our attention to the importance of

cultures and the construction of identity in organisational settings. Here, the emphasis is on differences of interpretation, a point frequently overlooked in much traditional marketing theory. Some managers here note difficulties attached to the creation of common cultures; this includes Ivan Kendle of Nina Beauty and Robin Cawley of Nelson Universals. Both of these are managers of larger organisations. In reality, it is the case that the attainment of shared values is unlikely in a significant number of organisations. This should not be seen as daunting however. It has to be acknowledged that shared meanings may not be crucial for collective action, but rather experiencing the collectivity might be. Through discourse and interaction, people may well fit their performances together for a variety of reasons. These might relate to purposes like the necessity for compromise and because the course of action that is recommended assists their own ends. Nick Catt of the legal firm Merry and Right, points out that many lawyers do not like marketing or its ethos, but do become involved in it because of issues related to expediency.

It is important to note that identities in organisations are constructed out of interaction, so this suggests that members must fully engage with others they work with, a point raised by Mike Clark of Vincent Duke, where interaction and openness is facilitated by a range of informal working arrangements. Cooperation is needed for the organisation to serve its purpose and this opens up a way for discussion. Discourse is central to the establishment of common ends, where in working out a common sense approach to marketing, managers should not lay down rules about planning, but shape and build understanding instead. An organisation is not a system but a collection of interpretations. Managers must listen to and interpret the stories of others and be facilitators of discourse. At the paintbrush manufacturer Henry Armstrong, Sheila Harris the marketing director, talks about everyone being aware of the importance of customers which suggests involvement and dialogue. At Tucker International, the food processing company, Melissa Jones also works at creating staff awareness through the operation of internal conferences.

Before looking at actual decision making processes concerned with planning, it will be useful to review what organisations do in terms of customer offerings. There are some similarities here, but also differences. The metaphor 'beyond the slavery of the four Ps', represents an important divergence from the traditional approach. The four Ps are a highly prescriptive part of the marketing plan. Research here indicates that this approach fails to capture the reality of the way in which marketing managers deal with their work. It is important to recognise here that marketing managers do have mixes, but these are virtually entirely dependent on the nature of the local context in

which they operate. At Jenkins Print, Irving Wallace commented that the four Ps are simplistic structures which do not capture the complexity of the world he inhabits. His mix is largely about two Ps, which are product and project management. The latter includes a range of issues from quality through to service and deal with factors like timescales and customer relationship management. To impose a rigid four Ps framework on Irving's marketing operations is not particularly helpful. At Nina Beauty, a key mix variable is packaging, which does receive attention in marketing texts, but has not been elevated to the position of a main mix ingredient.

In other areas people are seen as central, particularly in interactive areas like professional services, as pointed out by Nick Catt of Merry and Right and Richard Coates of Evertons. At Stirling Publisher, Jason Hobart points out that the conventional marketing mix does not cover service, a dimension he sees as being very important to his business area. This point is reflected by Jerry Court of the building contractor Morris Grout. The area of service is related closely to customer loyalty by Jason Hobart. Between these two areas, there exists an on going complex relationship that simply cannot be captured by the four Ps model, or by any plan that contains them. The metaphor deployed here returns us again to the idea of organisational members constructing their own common sense views of what is needed in order to satisfy customer requirements. This tells us that in developing marketing approaches, organisational members should not feel constrained to work within the four Ps box.

The next metaphor to be considered, 'otherwise we wouldn't have families and we wouldn't have friends, deals with the important issues of relationships in the marketing offer and the role of service and quality. In many ways it builds on and develops the previous metaphor. Central to the marketing offer is quality of service which is poorly represented in discussions of the conventional mix. A wide range of managers in this study draw on their local contexts in order to show how central relationships, service and quality are to what they offer customers. These present alternative, grounded explanations, which effectively displace the conventional marketing mix paradigm. David Borrows of Leighton Jay Technical Services talks about providing high quality service in the context of on going customer relationships, a factor that may seem obvious enough, but is perhaps an important lesson that less successful companies often ignore. In fast moving consumer goods, Sheila Harris discusses the centrality of customer service and Clive Terry of Thor Engineering explains the importance of this in his industrial area, where a high level of after sales service is provided to supermarkets. If customer relationships areas are central to the business efforts of these companies, then it is important that in learning about marketing, we think about

how some of these processes can be transferred and adapted to other contexts. The important issue here is for marketers to clearly establish what their key relationships are and then to engage in these social networks fully. This would represent an ideal action learning problem for organisational members to become immersed in.

In thinking about how marketing decisions are made, the process of talk in these organisations can be considered. Talk is decision making in action and of course involves customers, suppliers and those taking decisions about marketing internally. Talk then, is exemplified by the metaphor 'getting into other peoples shoes'. Here an intense reciprocity means that through talk, decisions are made rather than through linear plans. Where does a discussion of talk feature in conventional marketing texts or in research? It is a poorly represented area, where little theory is present. Des Arkwright of Newfound Council indicates that partnerships with business organisations are achieved through talk. For legal services, through talk, customers decide whether or not to take on the services of lawyers, a point made by Nick Catt of Merry and Right. As he states, customers do not buy the company or the document, but the lawyer. It is through talk that organisational members decide what is and what is not feasible, Talk is the action in organisations as decisions about marketing are constituted by language. In the interpreted, discursive and communal organisation, talk must be fully facilitated by managers so that out of discussion, action is realised which benefits all organisation members. Here is an action learning set and an issue. The question - in what ways can my organisation encourage productive talk?

In moving to a discussion of other metaphors, we can ask to what extent do formal marketing research and structured environmental audits contribute to the decision making process? These are dealt with by two metaphors in chapter five. They are about 'building pictures' and deal with the areas of analysis and marketing information which appear in the planning process. In prescriptive theory, a highly rational stages model is proposed for analysing the environment, which takes little or no account of the complexities of organisational action and the meanings held by individuals within them. Furthermore, the model represents an abstraction from the context of organisations in which marketing managers operate. In terms of dealing with the external environment and gathering market data, the building pictures metaphor symbolises the very individual approach that marketing managers adopt here. A key point relates to plausibility. How realistic is it for me to paint the picture I want, given time and resources available? This translates in a marketing context, into how realistically can I get the information I need? The lesson here is that marketing managers create their own environments. If they perceive environmental issues to be

important, then they will act on them. Cases here include Irving Wallace and the issue of the competitive opportunity he took advantage of. New entrants to the market lacked the attribute of quality his firm possessed. Irving Wallace could have chosen to ignore this opportunity, but he did not and achieved some new business as a result.

Jason Hobart of Stirling publisher points out that his marketing team will define and decide which bits of opportunity they are 'going to leverage'. These are important words. The environment is not out there objectively imposing itself on these organisations. Marketers do not endlessly sift through masses of data. It is all about appropriate selection and analysis. One key approach which is used draws again on principles of interpretivism. Both Robin Cawley of Nelson Universals and Mike Clark of Vincent Duke argue that knowledge of consumers can be achieved by a process of personal introspection. As the former states 'we are consumers in the world as well.' Thinking as customers themselves, what do they want? Here the importance of organisational members having the opportunity to work out issues and problems together is again raised. This suggests establishing action learning sets in organisations, in order to look at this area.

This process of establishing a discourse can also involve customers, where in depth information is obtained through the process of listening to stories (Zaltman 1996) and talking to customers, rather than through using standardised marketing research techniques. Examples of marketing managers using this approach to research include Clive Terry of Thor Engineering, David Borrows of Leighton Jay Technical Services and Roy Sands of Jenkins department store. This is not just a phenomenon of industrial marketing, as the last company here is retail based. The important lesson here is that members in organisations must work out collectively, through discussion and social interaction, what they see as being significant in the external environment. In 'drawing their own pictures', organisational members must work towards a common sense view of the environment which pulls on the stimuli they see as being important. Clearly this stimuli is largely, although not exclusively, industry based, a point that is apparent from the words of Clive Terry at Ardenwest. His case is typical. He uses his judgement to screen out information that is not directly relevant to his operations. In contradiction to the established prescriptive model, Clive Terry of Thor Engineering, gains most of his information from the dialogue that is established with customers. Environmental information is important, but the nature of that information cannot be prescribed. It is acquired over time by working in the industry and developing a knowledge of its 'black arts.'

In drawing out other insights from this research into how marketing decisions are made, there exist a range of approaches used here, which fall outside textual representations of marketing planning. The metaphor 'getting them on board', dealt with in chapter six, illustrates the central importance of relationships in the marketing decision making process. Decisions about marketing emerge from these relationships and are not preplanned in any rational, linear way. At Mitre Technics, it is impossible to build the complexity and dynamic nature of relationships into a simple linear plan. As Gordon Willis the managing director points out, every customer is different and every customer has a different specification requirement. Marketing managers look to their networks and it is out of these that decisions are made. Ivan Kendle talks about working constantly with the supermarkets he supplies to, in order to develop the appropriate products. An extension of this thinking is represented by key account management where relationships between supplying and customer organisation are very intense.

Managers understand that decision making occurs in on going situations, situations that cannot be captured by a linear plan. People events and resources are in a constant state of flux. There can never be any absolute starting points as plans suggest and neither can there be any certainties in these situations. As on board a ship, decisions have to be made in the context of immediate occurrences. Direction and timing may change, as is the case with the complex world of relationships and decision making. It is also clearly important to determine the extent to which relationships shape decision making. Managers, marketing practitioners and students could be involved in further action learning and action research projects, in order to answer questions related to finding out what are the critical decision making phases in marketing relationships and how decisions are actually accomplished.

The first metaphor in chapter six is about 'marketing planning as a religious rite and ritual'. This metaphor deals with a central element of traditional marketing planning theory, which is represented by the analytical tools which are supposed to aid the decision making process. The metaphor deployed here attempts to capture the ritualistic and semi religious way in which these tools might be used by managers. In trying to look at marketing planning from a different perspective, the question has to be asked what are the value of these tools? Firstly, there are a significant number of managers who do not use the tools. What can we learn from this in a theoretical context? One view, reflected in the words of Mike Clark at Vincent Duke, says that we think in terms of what we want as consumers. Customers do not usually think in terms of product or market development or market attractiveness, but more likely in

terms of how products and services fit their needs and lifestyles. Organisational members thinking as consumers then, learn from this and new or modified products and services can be developed. At Vincent Duke, this is a social, interactional process, with people learning what to offer customers on the basis of what has been discussed and experienced. At Lewis Stuart, a company which produces small industrial motors, Trevor Coles marketing decisions are not based on analytical tools, but on conversations with customers. The latter indicate to him their requirements through talk. Currently, prescriptive theory fails to take account of this social element of decision making. The central issue for managers to think about here is that if they want to work outside the 'boxes' of marketing theory tools, then they must work through the appropriate questions to ask of customers and also devise appropriate role play scenarios for staff who have to think like customers.

In contrast some managers in the study indicate that they use the analytical marketing tools. Probably the overriding lesson here is expressed in the words of Irving Wallace at Jenkins Print. He suggests that the tools can be used to direct thinking, to be used as springboards for discussion. For him, it represents only one input to the decision process and beyond that, judgements about local realities and operations take effect. Sheila Harris at Henry Armstrong the paintbrush manufacturer, uses the Boston matrix instinctively and intuitively. One is never drawn up, but thinking in terms of the categories represented by the boxes, assists her in the decision making process. This is non systematic and non objective, but nevertheless, the tool has some value. Robin Cawley raises the issue of the 'desperate' subjectivity of the tools and in particular the directional policy matrix, which suggests that this, and the other 'boxes' should never be viewed as objective scientific marketing instruments. In terms of the metaphor used, the parallel argument is that marketing managers should never put all their faith in these artefacts, as they do not possess all the 'mystic' qualities some authorities think they have. For all marketing managers, the decision has to be made as to whether the tools should be used or not. In prescriptive texts there is little choice. If loaded with local meanings, the boxes are shown here to have some relevance. Significantly though, a range of other ways to think through strategy have been theorised and recommended.

Central to the last point above and to decision making, is the role of tacit knowledge, highlighted by the metaphor in chapter seven 'having a nose for what's right and wrong'. This is a key variable which the marketing texts fail to deal with, yet instinctive and intuitive approaches to decision making appear common to many managers in this study. At Jenkins Print, Irving Wallace talks of this as the 'unconscious

competence'. An example of tacit knowledge in operation is when Gordon Willis of talks about making 'guesstimates' when deciding to bring out a new product. He does not articulate what is involved in making a 'guesstimate' but he has to draw on tacit knowledge which is about experience and judgement. Although 'guesstimate' is a throw away word, it is actually invested with great practical expertise; could someone working in the complex semi conductor market make a good 'guesstimate' possessing lots of traditional marketing theory knowledge, but having only a few weeks limited experience? It is obvious then when David Borrows talks about marketing graduates coming into his organisation and creating classic marketing plans and him seeing 'straight off' that these plans will not work, suggests that tacit knowledge is a crucial element to decision making. Jason Hobart also talks about the role of intuition in publishing, where teams can look at the cover of a book and have a gut feel as to whether or not it will be successful. At Vincent Duke, Mike Clark talks about a lot of marketing being done through the use of basic instincts. Robin Cawley of Nelson Universals says that in the end all that managers really have left is 'gut feel and this kind of wisdom and experience'.

The area of the 'tacit' could be an excellent learning vehicle for new entrants to marketing. An action learning programme could involve these type of participants in examining their own decision making processes in organisations, with a view to improving them. The metaphors that people work with could be unravelled and reflected on, helping managers to understand and articulate the tacit, moving it towards the explicit. The same approach could be applied to the study of emergent strategy, with learners being asked to evaluate the effectiveness of different types of emergent strategy. Alternatively, this could be an action research project with outside investigators setting up programmes to inquire into this area. Emergent strategy then, plays a highly significant role in decision making, one often given little credence in textual treatments of marketing. Strategy is found to be largely emergent in this study, as captured by the metaphor about 'armies hills and battles' dealt with in the first part of chapter seven. Decisions are made in present time, as with Ivan Kendle at Nina Beauty. Products in the aerosol market change so quickly, that protracted planning cannot take place. Michael Marston at Archer Television, talks about the unpredictability of markets in his area of business. At other organisations, managers must react to immediate changing circumstances, as pointed out by Richard Coates at the legal firm Evertons, when he was suddenly asked to pitch for some major work. Nick Catt of the other legal firm in this study also suggests opportunities must be taken as they emerge when he discusses the notion of the 'passing bird.'



For David Borrows of Leighton Jay Technical Services, marketing strategy is about taking chances and gambles and for Roy Sands of Jenkins Department store, it is responding to competitors, which cannot always be planned. Importantly, all opportunities appear to be assessed as they arrive and are weighed up on the basis of past experience. Preplanning does not appear to exist in any significant way. This idea of an emergent approach to the development of strategy is supported by the metaphor of marketing managers jobs being like 'fighting with alligators'. Day to day action is the work of marketing managers, which dominates what they do. It is out of this day to day action that opportunities and strategies emerge from talk, relationships and the use of tacit knowledge in making judgements on what to do.

This very obviously raises the question of the role of plans, which is dealt with by the metaphor 'bullseyes and rudderless ships' Here the real role of the marketing plan is made clear. It is not there as providing a prescribed course of action but is instead a cue for action. Nick Catt talks about the plan helping to guide his lawyers towards target customers. The plan represents an end point, in terms of what to aim for. It is the lawyer though who carries out the action, just as it is the player who throws the dart. Darts boards and plans are not the intrinsic action of the player and strategist, but instead, provide the cue for that action. Without the board, there is nothing to animate the player. In the same way, the rudder on a ship helps the crew to direct the vessel in a particular direction. Without the rudder the ship would be inactive. There would be no direction and without the plan, there would be no cue for action. For Robin Cawley of Nelson Universals, the world is too complex to be captured in a plan but one is still needed, otherwise the organisation exists without a sense of direction.

What has been presented here in this section is not a neat model to prescribe a course of action, but instead, a series of theoretical speculations have been discussed. These suggest possible ways to act. Much of this represents an alternative theory of action and meaning in marketing. Here the 'metaphors of practice' hold together the theoretical insights gained from the research, illustrating the local complexity of much marketing activity. In thinking through specific recommendations, a central issue here revolves not only around the nature of the marketing decision making processes used, but also around the plan itself. In the next section, a new proposal is made which deals with a revised marketing plan, encompassing as it does, the full implications of findings which demonstrate that the plan acts as a cue for action, rather than as a set of prescriptions. Significantly, all the theory in this section, which posits an alternative approach to marketing decision making, facilitates the development of a revised structure to the marketing plan. This is represented by the notion of a 'strategic

signpost.'

## **TABLE FOUR: METAPHOR AS THEORY AND THE STRATEGIC MARKETING SIGNPOST**

### **A] THE METAPHORS**

NAVIGATING THE TANKERS AND THE FLOTILLAS: definitions held by managers about marketing are indexical

IRON FILINGS AND MAGNETS: organisations are not systems but composed of individuals with diverse aims and goals

BUILDING PICTURES: the marketing environment is locally perceived and enacted

RELIGIOUS RITES AND RITUALS: Real marketing knowledge is local. Analytical tools cannot confer this knowledge power

BEYOND THE SLAVERY OF THE FOUR PS: marketing managers have their own marketing mixes

OTHERWISE WE WOULDN'T HAVE FAMILIES AND WE WOULDN'T HAVE FRIENDS: customers principally desire quality, service and relationships

THE BLACK ARTS: marketing plans are about local logics not prescription

ARMIES HILLS AND BATTLES: marketing strategy is emergent not preplanned

GETTING THEM ON BOARD: marketing decision making is based in on-going relationships

GETTING INTO OTHER PEOPLES SHOES: marketing decision making is based in talk not linear plans

HAVING A NOSE FOR WHATS RIGHT AND WRONG: much marketing decision making is tacit not explicit

FIGHTING ALLIGATORS: the work of managers is based in day to day action not plans

BULLSEYES AND RUDDERLESS SHIPS: marketing plans are cues to action not the action itself.

This above approach underpins:

## **B] THE STRATEGIC SIGNPOST**

REALITY is perceived narratively.

An understanding of marketing planning is achieved through METAPHORS AND STORIES.

The STRATEGIC MARKETING SIGNPOST presents marketing strategy as narration.

The STRATEGIC MARKETING SIGNPOST accommodates the subjective and interpreted world of marketing decision makers and other organisational members.

## **9.5. MARKETING PLANS AS STORIES; QUALITATIVE NARRATIVES AND STRATEGY DEVELOPMENT**

All managers here in this study have presented their perceptions and experiences of marketing in qualitative form. It would not be inappropriate to say then, that marketing understanding is largely qualitative in nature, an argument that Hackley (2001a p12) also makes. Managers here do not think or appear to act through the medium of bullet points, or in quantitative dimensions, which is the form in which marketing plans appear. In all cases here when managers speak, there is an intense qualitateness present. Alongside this, what has been established in this study is that the purpose of the marketing plan is to act as guide for action, as a cue. It is not a statement of the actual action to take place, or is it a set of prescriptions. As a consequence of these two issues, it is argued that what organisational members wish to broadly achieve can be written up in the narrative form. An interpretative account of marketing could then be provided, which gives real meaning and vision to employees. The resultant story can act as the frame which guides the conduct of marketing in organisations. Weick (1995 p127), has noted this point about stories acting as guides to conduct within cultures. This means then a reconstruction of the traditional marketing plan. The argument is that the marketing plan should itself be presented in the form of a story, the latter acting to create, sustain, fashion and test meanings in an organisation (Gabriel 1998).

Haberberg and Rieple (2001 p546), point out that stories are the narratives told by organisational members to each other and to outsiders, about what happens in organisations. In an influential text on corporate strategy, Johnson and Scholes (2002 p558), suggest that stories can be managed. It is argued here, that some of these narratives should be harnessed as plans, in order to better facilitate effective organisational action. For Johnson and Scholes (2002 p231), stories are a central element of a cultural web which exists in all organisations. This web includes factors like organisational symbols, routines, rituals and power structures, aspects of culture which influence the strategy development process significantly. For Lynch (2000 p316), stories are about what matters in an organisation, representing ways in which people can think about and understand their world. Johnson and Scholes (2002 p231), point out that stories make it possible to,

"...distil the essence of the organisations past, legitimise types of behaviour and are devices for telling people what is important in the organisation."

Traditional plans have similar types of aims. Narratives can fulfil precisely the same

type of role as traditional plans then, but arguably, accomplish the task much more effectively. In order to obtain some feedback on the idea of plans being presented as narratives, a practising manager was interviewed and asked for her views. Comments were not taped, but written up by hand at the time. Karen Loombe works for an organisation that has charitable status. She is the Operations Support Manager for Administration and Service Development, at the Newfound Community Service Agency. Her role involves some marketing management tasks, in terms of building relationship initiatives with a range of clients and client groups who use the Agency. The Agency provides local community services to local residents and businesses. This can range from small scale building work, to some limited maintenance of public parks and spaces, through to providing labour and administrative support to a range of voluntary bodies. It has strong links with the latter, who provide some of its finance. The Agency also has links with the local Newfound Council. In her role, Karen has the responsibility to implement part of the agencies business plan. Another manager was asked to be involved in order to reflect not only on the above style of plan, but to also provide some evaluative comments generally, on the narrative and qualitative style of presenting such a plan. A new and different perspective means that the view stands outside all previous engagements with the research process. How does a manager that has not been involved so far in this qualitative venture, see the issue?

One problem with the conventional approach is that the bullet points which pervade traditional plans often leave relationships unspecified and as many managers indicate here, these are central to organisational members perceptions of the world. Karen Loombe suggests there are other problems with bullet points.

" Bullet points paraphrase things and they assume background knowledge. What bullet points lack are the broader explanations which people need. Bullet points can mean that in times of cultural change, which I have to get involved in, the plan can just becomes an instructive tool that staff feel little engagement with. Staff can simply say 'I don't understand this' and not get involved. This can be a real problem when the plan is linked to staff development."

Traditional plans are also too universal. Statements are made which could apply to any business, failing to focus on specific contexts (see Shaw et al 1998). Additionally in theory and practice, plans are constituted by often terse statements and sometimes by analytical tools, which fail to capture the complexity or richness inherent in each organisations activity. Strategy is either couched in such general abstract terms so as to be meaningless, or presented in a highly prescriptive fashion which assumes an unproblematic predetermination to action and meaning. The narrative mode is

important in organisations and it can be argued that human cognition operates almost constantly in a narrative, story telling mode (see Sims 1999). Karen Loombe of the Newfound Agency also thinks that this is an important point.

" People think narratively, we do not think in bullet points, neither do people think abstractly when it comes to thinking how to achieve targets. In terms of my staff having to implement plans, people will say, 'I worked for so and so and this is how we did it, can we do something like that here? People rarely say we must achieve this or that ratio or percentage retention rate, but people will tell each other stories about retention rates instead."

Managers in this study think narratively and in natural language too, as evidenced by the many references to metaphors which are made. Here, significant metaphors have become the basis for rules of thumb action and guides to conduct. These metaphors represent stories and fragments of stories, which are part of the way organisational members generalise their experiences. Clearly, in most cases here, managers do not engage in fully blown narratives about their organisations, but they nevertheless are engaged in forms of story telling. Stories and fragments of stories, are a way in which managers make sense of the world and communicate that sense. Gabriel (1998) talks about these fragmentary stories as 'proto' stories which tend towards terseness, having rudimentary plots, which are often symbolically important. At Samsons building contractors, Mary Stone tells one of these stories in chapter seven, when she talks about relationships between her company and their friendly competitors. Gabriel distinguishes stories from opinions, the latter lacking any plot, characters and action and of course, this type of response is evident in the research here. Often though, as Gabriel (1998) points out, opinions often act as to announce a story. An example of an opinion is the comment in chapter seven by Sheila Harris when she states she would like to have more time for planning. This could easily lead in to a story about how her time is actually spent.

There are many good examples here in the research of managers telling longer stories. This could include Irving Wallace's story about how his organisation took customers away from a competitor in chapter five. Present in that story was a sequence, cause and effect, a priority amongst details, all components that can be remembered as a whole. Also in chapter five at Media K, Guy Martin tells his own story about the time he felt was being wasted doing awareness studies of marketing communications. In chapter six, Paul Peters of Earlham Newspapers tells a story of going away from marketing for a few years and then coming back and going off on a Malcolm McDonald course to see if things had changed...There are stories in the transcripts so far not reported, like Mary Stones narrative about a disabled housing

association tenant, who somehow complained to Samsons about an oven which they changed....

If people think in this form, it is appropriate then that the written guides to action, the marketing plans, correspond with this format. Importantly, good stories can be seen to contain a sequence of events and a definition of relationships. Watson (1994 p113), points out that telling and listening to stories is basic to the human process of making sense of the world. The stories we get involved with, provide a language for how we talk about the world and hence how we act towards it. The managers here use a discursive lay terminology, which clearly shapes the way they behave. Why not present plans in this format as well? Shaw et al., (1998), recount their successful experiences of using stories to drive strategy at the 3M organisation. Stories they feel are central to an individuals identity, being ways to form ideas. They pose the question as to why storytelling is discarded, when plans are drawn up. Storytelling represents the way we think and it is argued here that this cultural process should be utilised in marketing planning. Importantly, stories are part of a sense making process (Weick 1995, pp127-132), which can relate to a particular situation in an organisation. In this case, it is being related to the marketing planning situation. This new style of planning, if used by organisations in this study, would mean that their guides to action would likely to be even more effective than they currently are. Additionally, the plan as a narrative could be used as an educational and training device. For other organisations outside this study, it is argued that employees are likely to engage with the altered structure in a way that is not the case with the traditional marketing plan.

The issue now is to think about the format for this new type of marketing plan. The new form of plan which follows a narrative structure, does not have to be in a prescribed format. Interestingly, this approach could provide consultants and academics with a problem to look at in companies. How can the organisation construct its narrative? What and who should be in the narrative? Organisational members could determine their own approach and this could be an area relevant to action learning projects. A suggested format is as follows.

Firstly, the Preface. This can serve as an introduction to the main story. The names of the main players and the organisation can be included here. Also organisational members could be reminded of previous stories which ended in success. What previous stories have been told which are important to remind people of? It could also draw out any main themes that key organisational members feel it is important that others know about. As Weick notes (2001 p341), stories can act to remind people of

key values. Next the Backdrop. Here the current, broad situation can be defined and articulated in a lucid fashion. This involves providing a narrative about the business environment in terms of those general forces and factors that organisational members think are significant. It takes the reader further into the companies main story line. Coupled with this, there should also be an explanation of key relationships and networks that influence organisational members. Thirdly, there is the Confrontation. This part of the story should deal with the specific challenges facing organisational members in terms of critical issues that need to be dealt with, in order to maintain or increase chances of success. Then there should be the Settlement. The plan should indicate how obstacles will be overcome and the various methods deployed in resolution of the challenge. Finally comes the Epilogue, which can be a short summation as the plan unfolds and is updated. It could also discuss where the organisation is going in terms of whether or not it is achieving what is required.

Each of these areas relate to the typical structure of the story which we are used to. The Preface introduces us to the plot. The Backdrop, reminiscent of a play, sets the broad scene, then there is the Confrontation which details the main characters and situations of the story. What follows is the Settlement, which is the working through of the story, the main plot, which is about the winning of a struggle. Finally there is the epilogue, which updates us on new events in the story. For Weick (1995 p128), stories gather strands of experience together into a plot that produces an outcome, where sequence is the source of sense. The way the story is structured here is to replicate the idea of the sequence situation - transformation situation (see Weick 1995 p128).

Karen Loombe of the Newfound Community Service Agency points out that presenting plans narratively to people means,

"...because it is written in everyday language the technical ambiguity of the traditional plan is avoided. It is a more interesting style that people can engage with. It can clearly explain what needs to be done and through little stories, give examples of how to do it. People can then think of their own ideas to do things. Yes the narrative style facilitates engagement. Conventional plans are too broad and abstract. "

As Shankar et al., (2001) point out, the narrative mode has been applied to areas of organisational studies (see for example Morgan and Dennehy 1997; Gold 1996). Shankar et al.,(2001) also note that the narrative form has been applied to consumer research in a limited way. To use the narrative form in marketing planning however, represents a new departure. With regard to possible content for the narrative form of plan, we can draw on an example from the research in this study. We can take one



organisation and indicate what a narrative could look like for one particular firm. Here, there is one marketing 'signpost' written for a particular part of one companies marketing operations. The term 'signpost' is used in preference to other expressions, because a signpost acts as pointer, showing the direction for a journey, but not taking the traveller there. The actual journey is worked out in progress, in the same way that marketing action is accomplished within the companies of this study. Importantly, the strategic signpost does not have to contain enormous amounts of detail. Its role is to guide, not to direct. One issue for organisational members to think about in the space of their own firms, is the number of narratives needed. Conceivably, there could be differing ones for different product groups or markets. The strategic marketing signpost below is approximately two thousand words in length, which makes it about the same as many conventional marketing plans.

## **9.6. LJTS UK: A STRATEGIC MARKETING SIGNPOST FOR THE F.E. MARKET**

### **Preface**

The company is Leighton Jay Technical Services which was started in 1979 by Melvin Roe, who used to be an engineering lecturer at Newfound college. We are really a series of companies who market into education and in particular the FE market. Melvin started in a small way, by winning a business award from the Council, when he got a rent free unit for a year. That unit still exists and the present site is based on it. We started with just four or five products, aimed at the vocational market. We got some assistance from an international marketing consultancy who helped us see the potential for our products on a wider scale.

We have now evolved into an international company and by 1984, we had a subsidiary in the USA. Staff are split between Newfound and Little Prairie, USA. Since 1984, we have grown and grown. We sell electronic, computer based educational products right through the age ranges, from pre school to adult. We have developed a range of companies under the LJ umbrella. These include a consulting division and a research and development arm, which is responsible for software development and curriculum development. The story is that we are selling to education, to essentially anyone who has the got the money and can speak English.

We are the number one provider of computer based training for electronics in the UK. The key thing to tell is that we are about computer based training packages and purely

into the education market. What we all have to remember, is that our business has been built up on getting close to customers in order to listen to their stories about what they want. If we don't continue to do this, problems will emerge. Think about Sandra Winter two years ago. All the telephone calls, committees, visits and demonstrations she did at Beta College and at the TEC. This built up our relationships and gave us the best sales figures for a decade. We sell the best product available to do the job and we support the customer who needs it and that includes the student who uses it. This is our philosophy.

In our company, sales and marketing are closely linked. Marketing is not run as a totally separate function. The sales team are part of the marketing team. Salespeople provide a lot of feedback from the market which needs to continue. Marketing is the more analytical side. It takes the information from the salespeople and then creates or adapts products accordingly.

## **Backdrop**

Things have changed in colleges since incorporation. The FE market is now different. Before incorporation, every one had a set budget, they knew how much their budget was every year. We just had to convince colleges to allocate a certain percentage of that budget to our products every year. The story is different now. Currently, there are a range of ways in which colleges can access funds, by putting in structured bids for funds for particular pots of money. We need to access and build relationships with people who are involved in this type of activity, who work in colleges and those who provide the funds. We must find out what the priority areas are.

It is important that we are aware of what leading edge thinkers are saying about the education market. We must know all about developments in teacher training colleges. What significant issues are coming out from think tanks, which is going to effect computer based training? Information needs to be collected on these areas. Also, we need information on areas where shortages in computer based training exist.

We must track future technology changes which will effect education. Remember, we have got no control as far as operating systems go. When Bill Gates decides to upgrade Windows we have to go with it, no matter what it costs. We are always chasing and catching up, but that goes for our competitors as well. Presently, the government is now pushing through things on distance learning and telematics. Additionally, there is a whole bunch of funding that is available to education from the

European Community. This funding currently is £30 million. There is plenty of money to bid for, as long as it coincides with what the EU providers have agreed to. There may even be funding coming from some world sources which we have to be aware of as well. Technology development costs are high compared to a few years ago and investments must be carefully considered.

We currently run nine successful product ranges in the FE market in the UK. What we have to remember is that we must be reactive and proactive; the education market is changing a lot and we have to respond quickly to that. We will continue to look mainly at market data and also keep talking to people that matter in education, industry and where necessary government. Currently we have a high market share; at least 30% of customers in the market rebuy from us. This has moved us up from the situation where 10% to 15% were rebuying. We want to continue to build market share.

## **Confrontation**

Further education buyers are now much more professional. It is now very much like business to business marketing. The whole area is in a state of flux and has still not settled down properly post incorporation. What is also certain is that learners in schools and colleges really expect high quality products. We have to be aware that a lot of our competitors produce educational products that entertain children. Take a look at the ranges that Tango and Alpha make. We have to be aware of this, but at the same time make sure that we are supplying technology education solutions not just technology entertainments. We have for a long time been in front of the competition. The danger is to get a bit complacent. Tango have recently appointed a new marketing director who has got a new team around him so we can expect some developments in that area fairly soon now.

We need to produce and market in a sophisticated way, so we know that is about good presentation, graphics etc, making sure the Internet site is continuously developed and that advertising material is always 'glossy'. Think back to the problems that Fox had when kids went on their site. It is still being talked about now. The kids thought it was frankly rubbish. It's ok for competitors but not for us! Children today are much more aware consumers. Image and branding is all important. Also we should produce solutions to really teach kids. We have to keep right up to date and need to be in the electronic book market as well. There is a continued race going on in technology so we must keep up and make sure everyone who works for us is aware of this and that our products always remain compatible with the major operating

systems.

Lots of sales in education are made on a referral basis, so establishing and maintaining relationships are very important indeed. Product lines are changing rapidly as examining boards can drop particular curriculum areas and we need to be aware of this. Don't get caught out. It is important that we continuously monitor current problems and perceived problems related to learning in colleges and develop solutions to those problems. We have to keep talking to tutors, learners and educational managers. The monitoring of the governments new initiatives must be carried out in relation to information technology developments in education.

## **Settlement**

Our aim to go for £3million worth of sales in the UK colleges for the coming two years, with a new product. Development costs are targeted at £100,000. The payback time is two years. The product is provisionally titled 'Within Technology' and will be used in electrical engineering workshops in FE colleges. Our existing product ranges will be maintained and we not expect to revise them for another two years. Currently we are unaware of any competitors developing this product, but if they do we will respond at the time. This could mean more intense sales drives and marketing support.

Generally the sales and marketing strategy will be to continue to sell in the UK FE market through our direct salesforce. They will be supported by discrete advertising through targeted mailshots. Relationships and the networks salespeople are involved in and we have built up, are really important and significant to what we do. We have to work with the people who control the funds in colleges and also help them to access information about further government funds. This way, we control the sales environment and the sales message.

Specifically, we intend firstly to establish three pilot clients, so they can test the new 'Within Technology' product groups in colleges. So, we need to go in and see people, build on existing contacts, make some new ones. Without these we will not be able to get the pilot up and running. We will part fund those pilots, in order to get them into the college market. Colleges will be part sponsored then. We will do some demonstrations at those sites.

We will get the support of local training councils in the areas of the college to support

our initiative. We will get the packages up and running. We will use the information from these pilots in order to produce case histories which we can use for marketing purposes to other colleges. We will show other colleges how successful these are. People in colleges will want to know who is using this product and how it has worked out, who is using it. This information can be provided by personal calls and mailings. The market will have lots of questions that we must be ready to answer. We can send out a targeted series of information sheets about our product to other colleges showing them what it can do. That is an important marketing opportunity that cannot be missed. Show that the product is innovative and will meet the needs of students and educationalists. We are looking at about a ten month time span here.

The whole process of product introduction can be supported by the following. We will get other people to produce seminar papers for educational conferences to disseminate information about these products, clearly this means building and developing relationships with tutors and other key educationalists. We will need to talk to lots of different client and user groups about this development. We could produce one or two weeks of advertising in the Times Educational Supplement. To the pilot colleges and as the scheme rolls out, we will provide excellent technical support, with no charges. Quick attention is a priority. This works out much more cheaply than a three month advertising campaign in the Times Educational Supplement. We need to make sure these early customer groups keep using the product. These will be our references. Reference selling is the key here. As we have said before, relationships are really important. It has not been unknown that in the past, customers who have been upset have cost us about £100,000, plus the poor references and loss of general goodwill.

Salesmen are to remember that the relationship is with the company not with them as individuals. We have had the experience of a salesman who denigrated head office by calling someone there names, in front of a customer, for making a mistake. This is to be avoided. Remember we must communicate a positive message about this product and our company. Finally, a sales exhibition should be set up as soon as possible, near to, or in to London, as this will enable us to meet new customer groups and renew existing relationships. A range of promotional materials has to be developed for this.

## **Epilogue**

Three months into the programme and we have established successfully two of the

three pilot groups. A series of targeted communications have got out to other colleges and sales people have reported good levels of interest. Our web site has reported increased traffic levels. There is as yet little evidence of competitors moving into this area, although we have noted that Z has now got a product that competes with our Master H range. Z is totally new to the market and caught everyone out. Thankfully, few technical problems have developed with the new product. These have been dealt with speedily from initial notification of the problem through to resolution. It is now important to push on with the national sales drive and also try to get the final pilot client college in place. The Technology in Learning Conference at X University had two seminar papers that discussed electronics education and our products were highlighted favourably.

### **9.7. STORIES, SIGNPOSTS AND MARKETING PLANNING PROCESSES**

In the above narrative, a story is told about the growth of LJTS which can inspire and also remind organisational members of the early days. In the Backdrop and in the Confrontation, key characters and situations are introduced, detailing the challenges to be faced by LJTS in the main part of the story. In the Settlement, the story unfolds as to how these challenges can be met and overcome, through the use of particular marketing strategies. Furthermore, the story shows the importance of characters and relationships outside LJTS, crucial elements in ensuring that this story ends in success. The latter is monitored and evaluated through the Epilogue, which shows LJTS on the way to achieving a satisfactory close to this particular story. A key point to make here is that the narrative structure of the strategic marketing signpost is entirely compatible with an interpretivist approach. While it is usually recognised that stories have a beginning, middle and end, within that structure the story teller can fashion a tale in whatever format they want, so long as a story is told. Importantly, the narrative style allows a full account to be taken of local context. After all, the novel is act of individual creation drawing on subjective realities, and if this is the metaphor which informs theory here, then the marketing plan can also be constructed and lived in this fashion.

To summarise, in the first instance, metaphors assisted the researcher in organising findings. These same metaphors were used then as devices to generate new theoretical insights into marketing planning. This theory shows that marketing planning is a locally particular phenomenon, understood qualitatively and narratively. It represents a major departure from the way in which marketing planning is conventionally understood. Action learning and action research can be used to

generate more of this local knowledge. Out of this local logic, it has been found that a plan is needed to function as a cue to action, which fully accommodates local interpretations. This plan must also facilitate the broader issue of a general qualitative, narrative understanding of people, things and events. Such a plan is represented by the strategic signpost.

In terms of the example of a strategic signpost, Karen broadly agrees with its style and aims.

" Looking at your headings and type of approach, yes, I can see that this reflects a narrative style. Its about the right sort of length, Its telling people about a situation and what can be done and who and what is important. I could use something like this and would prefer to use it, than what we have at present. Our plans are too brief and technical, they do not provide much explanation. I am not sure about your headings though - I might want something a bit more simple for my staff."

Shaw et al (1998), point out that we slowly acquire the ability to formulate plans through the various stories we hear in childhood. From these, children learn to picture a course of action, think about its effects on other people and then decide whether or not to do it. Story telling and planning are hence connected. The telling of stories is a way of making sense of reality. By reconstructing a plan into a sequential narrative, it frames situations that can then be worked out as action in organisational contexts. This relates to the research findings. In terms of these, an important point has to be made here. Significantly, the narrative structure of the strategic signpost accommodates entirely the research findings of this study and fashions them into a framework that then actions the same signpost.

In dealing with this, what the above strategic guide makes possible, is the working out in the organisation of emergent strategy. The guide provides a vision of where the organisation wishes to go but does not constrain or prescriptively drive action. It recognises that action will emerge from day to day activity, on an incremental basis. In this study, significant evidence supports this view. As talk has been shown to be central to marketing decision making, the plan as a guide allows action to be initiated from this process and to become central to decision making. The above plan also draws on everyday language and understanding which people in the organisation can engage with and be animated by. Hackley (1998a), notes that respondents in his study of an advertising agency did not draw on vocabularies of academic marketing but used instead, an authoritative lay language. This is the language used by managers in this study as well. Managers here do not lack intellectual capability, but

have selected a different form of discourse to that of the traditional marketing plan. This lay language should be represented in the strategic marketing guide as it represents the reality people work within.

Firat and Schultz (1997), argue that in these post modern times, marketing strategists need to pay much greater attention to the tacit and the visceral and also to the feelings of consumers. These are factors that cannot be captured by traditional marketing planning techniques such as segmentation demographics. This study has found tacit knowledge to be a key ingredient of marketing decision making. Furthermore, it permeates the emergent strategy decision making process. The guide allows full range for the tacit as areas of it will be about the intuitive, which has to be learnt in the context of the community of practice it is drawn from. Within the context of the strategic signpost here, tacit approaches can be used, where managers draw on experience, judgement and intuition, in making decisions which push organisations and their members in the direction the guide intends.

What the strategic guide also facilitates is the local context of action. The general terms and the headings which are used, means that within this framework, marketing managers and other organisational members can determine what they think marketing is, using the common sense approach which was outlined at the start of the previous section. This issue also relates to the interpretation of the value of marketing held by organisational members. It has to be recognised that the organisation does not have a voice, only individuals within it. The narrative that is presented must take into account the sometimes divergent views of organisational members and there should be attempts made to work out and share the same story. Weick (2001 p341), notes that when people do share the same story, then those stories can then provide general guidelines within which action can be adapted and customised to local contexts. Stories can then act to coordinate activity within cultures. There should be a constant interaction where meanings that come from marketing directors and managers intermingle with those of other organisational members who may see things differently. Stories can and should be shared.

It has been established that marketing is about issues related to quality and service. The above format allows managers to develop their own marketing mixes unconstrained by any prescriptions. Importantly they can put into place mixes that work for them. For David Borrows of Leighton Jay, marketing is about relationships and selling. This guide allows him to go ahead and develop this approach within the contextual space of his own organisation. Any approach to marketing can be



accommodated by the strategic signpost. The whole range of different perspectives on the nature of a marketing mix could be contained in the section on 'Settlement.' For example, Ivan Kendle could construct his narrative around packaging and Irving Wallace at Jenkins Print, could do his around project management. There are no prescriptions here, unlike the conventional plan. Additionally, more or less detail can be put in, according to what organisational members think are appropriate to their local circumstances. Importantly, success can be judged by the narrative which appears in the epilogue.

With regard to questions of marketing analysis and information, the 'strategic signpost' again allows marketing managers to construct their own enacted environments. As can be seen above, David Borrows does not call on any so called 'objective' environmental factors when discussing the 'Backdrop'. It is an outline of the issues he sees as important which must be monitored. As with novels and narratives these are personal to the individual writing them, but at the same time shared with others. David Borrows and other organisational members select their own environments and work on them. The strategic signpost facilitates this.

Whether or not managers decide to use the analytical tools in the marketing planning process is also made relevant to local circumstances. For David Borrows, there exists no formal role for the analytical tools, but he thinks it is useful to think about products in terms of the various categories. If we wanted, this approach could be woven into the strategic signpost in some way. Whether or not these tools enter the organisational narrative depends on the view held by members of the firm. No specific course of action is being prescribed here, only concepts. Furthermore, this guide can accommodate more or less marketing research, again dependent on the use organisational members see for it. Here, a narrative rationality should be able to register and summarise scenarios for organisational members. It is likely that more can be remembered that is significant, from the Leighton Jay Backdrop above, than from the presentation of marketing research models with their notative, rational style. Finally, it is of course possible that metaphors could be embedded in the strategic signpost with its emphasis on natural language.

## **9.8. IN CONCLUSION: CROSSING THE MARKETING TERRAIN, A TRAVELLERS TALE**

In summary here, Kvale (1996 pp3-4) uses the insightful metaphor of the interviewer

as a traveller, which captures well what this research has been about. The traveller wanders through the landscape and embarks on conversations with those encountered on the way. Local inhabitants are asked questions that lead them to tell their own stories, through talk, of the world they live in. The traveller explores the many domains of the country as unknown territory, unaided, or with the use of maps. In travelling over the terrain of marketing, this traveller took with him a map called 'the strategic marketing plan' which proved to be a helpful guide to the reality of the places he went to on his journey.

The travelling metaphor and the map was first mentioned at the start of chapter one, at the outset of this particular journey. Maps represent one form of social construction and it is important to note that they only partially reflect the reality of the terrain that is being travelled. Certainly, the map as a conventional strategic marketing plan, did not fully reflect the context, the ambiguities and the complexities of the places visited. Reality was multifaceted, uneasily accommodated into such a device as the conventional marketing plan. It seems clear that we cannot collapse the skills, knowledge and experience of the marketing manager into an all embracing analytical model. The contribution of the latter has to be recognised though, bearing in mind that some managers here in this study, invest parts of it with some value. A key issue here is to accept a diversity of approaches in marketing theory and practice.

Kvale (1999 p4) points out that for the traveller, the journey should be formative, which it was and hopefully it is for others, who read this. Eventually then, the journey should lead to a tale being told on returning home. Here, what the traveller has heard and seen is described qualitatively and is reconstructed as stories to be told. A main story to tell from this travellers long journey, is that a constantly recurring theme to tell and retell, is that marketing is typified by a diverse range of locally constructed realities. Much effort has been spent in this and previous chapters, in trying to understand this local complexity, but what is more important at this point, is to say that marketers must come to terms with the ramifications of this local perspective. It is argued here that this local perspective can be fully accommodated by the strategic signpost. Consequently, practitioners, academics and all those involved in marketing learning, could begin to think about how such a framework could be applied to their situation. It is necessary therefore, for the general community of practice that is marketing, to fully acknowledge the diversity inherent in the idea of the strategic signpost and to build around it appropriate learning and theory generating devices. Much of the last chapter has been devoted to this task.

If this diversity does become recognised and acknowledged, then we may then start to move away from the situation where marketing practitioners are failing to read the academic journals because they are simply not relevant to what they do. Theory needs to become more practically relevant if, as a recent survey suggests, marketing managers see it as only being used by academic researchers (see McKenzie et al., 2001). Potentially, the strategic marketing signpost and the theory that underpins it, considered here, can make important contributions to the process of making marketing knowledge and learning much more thought provoking, practical and relevant to managers, staff, young professionals and to students.

At the same time, the academic knowledge base of marketing should become widened, as new perspectives based on sociology, cultural studies and psychology are placed more centrally. It can be argued that in marketing we do not rely enough on basic disciplines, which is pointed out here, should be addressed. Furthermore, there needs to be a greater commitment to qualitative research into marketing, which should be used to develop new theory. Added to this, through the use of action research, action learning and an awareness of the role communities of practice, we should be able to take possession of a different knowledge base about marketing. It should be one that recognises marketing's essentially phenomenological and socially constituted nature, a nature which is some considerable way removed from the systems based and technically rational and reductionist model which currently dominates much of the subject matters discourse. The theory which has been presented in this chapter has been an attempt to widen the marketing knowledge base. At the same time recommendations both general and specific have been made which are intended to bring this theory into the lifeworld. In particular, the 'strategic marketing signpost' is advocated as a holistic methodology which will further develop marketing understanding and practice.

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## APPENDIX ONE

date

ref A:\letr1\

Dear

I am a lecturer in Business studies at Newfound College, and would be extremely grateful if you could assist me with the following matter.

For the purpose of a research project and study I am conducting, partly funded by the college with a view to developing our response to local business, it is hoped that interviews can be carried out in the Newfound area, with managers who have responsibility for sales and marketing in their organisation.

In the interviews, which I anticipate lasting for no more than forty to fifty minutes, I would like if possible, to be able to find out from you, your organisations view of marketing and its usage, to include what can, or cannot, be planned for. To give you a handle on what I am looking at, the following extract may be seen as being helpful.

In a recent business publication, about strategy, the general point was made that

Marketing textbooks assume the existence of a world that is unrecognisable to managers who have to manage marketing and selling for real.

If you have a view on this which you are prepared to share, then perhaps you would be willing to discuss this with me, and explore the issue of the reality of marketing and sales management, as it applies to your company.

I hasten to add that I do not wish to obtain any confidential knowledge, be it financial, strategic, or personal and anonymity is completely guaranteed. I am mainly interested in your general approach to business decision making.

I would be very pleased to provide you with a draft copy of my project on completion, as it may be of use. If possible, I would like to be able to tape the interview, although if you are not agreeable, notes can be made by hand.

If you are willing (or not) to participate in this research, then I would appreciate it if you could complete the tear off slip and return it to me in the stamped addressed envelope provided. I will then telephone to make an appointment for the interview at a time convenient.

If you require any further information before the interview, then please indicate in the appropriate section of the tear off slip, and I will be very happy to discuss this with you, or post on some details. I have a short list of questions printed, which you could look at prior to the interview.

I very much hope that you can be of assistance in the completion of this project. Thankyou for taking the time to read this letter.

yours sincerely

BARRY ARDLEY

.....

NAME OF COMPANY

YOUR NAME AND TELEPHONE NUMBER

**please circle your response**

I agree \ do not agree to an interview

please provide me with more information

**before the  
interview**

**before I agree to  
an interview**

.....

## **APPENDIX TWO**

### **RESEARCH QUESTIONS**

Below are a number of questions and issues which will be covered during the course of the interview. The main question is followed by a few key words or terms which relate to the area and help provide a 'prompt' for thought.

#### **WHAT CAN YOU TELL ME ABOUT THE TYPE OF BUSINESS OPERATED?**

general outline background on organisation - size - structure - markets - products - services - aims

#### **WHAT IS YOUR ROLE WITHIN THE ORGANISATION?**

tasks - responsibilities - what you are seeking to achieve - relation to other parts of the organisation and other employees

#### **HOW WOULD YOU DESCRIBE THE VALUES AND BELIEFS ABOUT HOW BUSINESS SHOULD BE DONE, HELD BY THE PEOPLE WHO WORK HERE?**

attitude to doing business - focus of company - eg financial control - customer service?

#### **HOW WOULD YOU DEFINE MARKETING?**

the meaning of the term held by you and those you work with - is it different or the same as management thinkers and 'gurus' you know about? Do you take note of and act on, the latter's views?

#### **DO YOU PREPARE A MARKETING OR SALES PLAN AS A WRITTEN WORKING DOCUMENT? if yes, why if no, why not?**

#### **HOW DO YOU AND OTHER EMPLOYEES GO ABOUT MAKING SALES AND MARKETING DECISIONS THAT LEAD TO PROFITABLE EXCHANGES WITH CUSTOMERS?**

intuition? - accounting based? - research? - marketing\sales models as guides? - good organisation?

#### **WHAT IS SUCCESSFUL SALES AND MARKETING ABOUT FROM THE CUSTOMERS VIEWPOINT? HOW IS IT MEASURED ?**

eg; good products - good communication - sales staff? measurement by; customer surveys? complaint monitoring? financial performance?

#### **HOW IMPORTANT (OR NOT) ARE FORCES OUTSIDE THE ORGANISATION WHICH HELP TO SHAPE YOUR APPROACH TO SALES AND MARKETING?**

competitor activity - social economic trends - management thinkers

#### **IS THERE ANYTHING ABOUT THE WAY YOU DO BUSINESS YOU WOULD LIKE TO IMPROVE OR CHANGE IN SOME WAY?**

different methods techniques\approaches?

#### **DO YOU HAVE ANY FINAL COMMENTS TO ADD TO WHAT HAS BEEN SAID?**

overview - conclusion

### APPENDIX 3

#### STATIONERY OFFICE (1.5.98)

*QUESTION:* It is only a transcript and afterwards if there is anything you are unhappy about it can be eradicated. I usually start by asking about the general background of the organisation, its size and its markets and its structure.

*ANSWER:* OK. Well, from a marketing point of view, it presents a challenge, because, I don't know how much you know about the business, but it was HMSO, recently privatised to the Stationery Office, that in itself gives us one challenge, but from a marketing point of view, the real challenge is the breadth of our product list. We are a national publisher, one of a division of four. The TSO has three other divisions but they are business services orientated, document management, facilities management and print, so we as publishers, stand out as a division on its own and we have a stock list of some 45,000 titles. Most publishers will have maybe a few hundred, over time a thousand or so, we have got 45,000, so the business is one in which we have a huge number of products, many are daily products like the daily Hansard, the London Gazette which is daily. Others will come out after a ten, fifteen year period of development, so that is the spectrum in terms of product. So the business is about a 380 person business in national publishing. Our turnover publishers figure is in £60-£70m mark and we enjoy the pretty sizeable margins that a publisher in the business and professional market enjoys. We don't get involved in the huge print runs of fiction publishers, but we do get involved in publishing higher priced items that maybe selling a few thousand, as opposed to the 50 or 60,000.

*QUESTION:* So presumably since privatisation it has a wider range of publications?

*ANSWER:* It is. On privatisation we had a bedrock of official and governmental publishing, we still have part of that publishing contract and we are in the middle of a five year contract and that is good news. What we have done is to day, OK we will take that as a client based publishing, publishing for departments and add to it more risk publishing, so we are developing publishing in the business arena and the heritage arena and more in the health arena that is our own publishing and overall aim is to add value to existing products and therefore sell it to a wider audience for a higher price. Secondly, to create new product and sell it under the TSO brand name which has credibility because of its official background. So we are trying to reach a wider audience with a large number of products at a higher price.

*QUESTION:* Your role in the organisation is?

*ANSWER:* I am marketing director for publishing, not for the whole TSO, but for publishing. We have a team of nineteen in marketing and we try and take a classic marketing approach in an industry where such an approach hasn't been followed.

We have a product marketing team of four who are tasked with the desk research, market research, primary, secondary, looking at idea creation, working with focus groups, currently with product concepts. Traditionally, in a publishing house, that has tended to be the domain of the publisher, not the marketer, so we have said we will take that on. We have recruited people from consumer products, from manufacturing, from the pharmaceutical industry and we have brought them in because they know different industries and they know the classic marketing approach. So, the research takes place, at product design and concept stage the publishers get involved and start to input what really can be achieved, at which point either another stage of research takes place, or more usually, we go straight into developing the product for promotion. At that point the marketing communication teams, the second major team kicks in and then starts with identifying who we can reach, at what cost, and put together promotional plans. The promotion goes out, at which point the third bit of the team, which is the graphic, gets involved, and this is a part of a marketing team you would only get in publishing and they are involved in cataloguing. They are librarians by trade, but their output is, it could be described as quasi marketing output and indeed we sell it, so they revenue as well. They earn revenue as well, which is very good news. So that's graphics. Then the fourth bit of the marketing team, and this is just a one man band at the moment, is subscriptions and standing orders and again a particular task, but within the marketing framework it is what would classically be described as loyalty marketing most probably. We are selling the concept that they should buy again and again and again and set yourself up as a loyal customer.

*QUESTION:* So this relationship marketing idea is quite strongly entrenched?

*ANSWER:* It has by default because in publishing people have always been involved in subs and standing orders, but what they haven't done is approach it from the more classic loyalty marketing, for example, we tend not to talk about the net present value of a customer, we just talk about getting a subscriber. We historically tended not to talk about the incentive you would need to offer a loyal customer to keep them on board because it is eight times more worthwhile than getting a new one, whatever its statistic is in publishing. So, my subscriptions marketing manager who starts on Tuesday, because this is a brand new job, will be tasked with identifying who the best customers are, how we built loyalty, how we bring new customers on, how to prevent attrition of the people who fall away, how we win back attriters once they have fallen from you and here we are taking again a classic marketing approach, so the message really is that I would hope you are talking to a marketing department that is more classic than you would find in other publishing organisations and we have sold this to the company on the basis that we will be able to deliver a better product and to reduce actually the costs that we have incurred in promoting some of those more regular products because we won't need to buy in the large numbers of lists because we now know exactly who to mail the proposition to.

*QUESTION:* So you manage the teams do you and do you spend most of your time managing them or do you get involved in the wider marketing issues?

*ANSWER:* I have been here since December so my time to date has largely been spent recruiting the teams, getting key managers in, but making sure that business as usual activity continues, so I do get involved in the nitty gritty decisions about where we advertise and who we mail, I get involved in looking at creative and making assessments of the value of it. Also, though, I have been considerably involved in working with the sales team and customer teams because that is natural, and also with the publishing teams, in deciding what our progress is as a publishing idea and we have a process here, as sales and marketing are required to sign off a product before it goes into production, they are also required to sign up to a number of sales over, it is calendarised, so I have to commit myself to that. So the key titles, I literally have to sign them off, so does my colleague in Sales, and then we live with those targets. So I am involved in that, which is great because I expected not to be. When I joined I expected that I wouldn't be part of the process but I was and that continues.

*QUESTION:* Some of the literature suggests that what a lot of senior managers do is direct, control, co-ordinate, plan, things like that. Do you spend your time doing that sort of classic role or is a lot of it day to day issues that emerge?

*ANSWER:* At the moment I am doing less co-ordinating and planning and more day to day management than I would wish. With the new managers coming on board, my communications team manager joined two weeks ago, my subscriptions manager joins next week, I would hope to be able to get the ratio right. I will be responsible for achieving this year's sales through the marketing channel and for developing the plan for next year and for future years that shows incremental growth and as the year progresses, I am going to spend more and more of my time planning next year and I think it is fair to say there hasn't really been a marketing plan for this business post-privatisation. There was a business plan which we are working to but what I inherited for this year was not a marketing plan, I inherited the head counts I could recruit up to and I inherited an operating expense and A&P figure I could work within, it certainly wasn't split out by publishing area or by title, so I am developing that for this year and proposing what we do for next year.

*QUESTION:* Would you say you inherited the marketing orientation of the company then when you are talking about the values and beliefs that people hold or?

*ANSWER:* I was brought in and my boss before me was brought in because the business plan said the company had to be marketing lead or market lead and we have met with resistance from the publishing teams, I think that is probably natural, both because they had no great market focus before, but also because within publishing this isn't the way things traditionally are done. But we have taken a classic approach to get people involved in the process so the market research we have done, we tend to take people off site for two days, we give them focus groups to observe and we do brain storming for the next eight days.

Publishers who have been through that process come out of it saying it is great. This isn't a market lead company yet but we are making it.

*QUESTION:* So you have got a programme of sort of internal marketing operating?

*ANSWER:* Yes.

*QUESTION:* How would you define marketing?

*ANSWER:* Good question. Understanding what the right product is for the right person for the right price at the right time. Marketing in my mind is about understanding what the market wants or sub-sets of the market and designing or helping to design the right product so that you can then promote the product to the end user and what we have inherited here is marketing but it picks up the process mid-way through and says, right I have now got a product I will market it, and we are saying, that is not right, you need to be involved early so you design the right product in the first place, then by all means we will promote it. So we do do a good job here of putting out leaflets and direct mail, we haven't done a good job of designing the right product in the first place. So that is what I see, by marketing is at the end of the day selling, and you sell more by having the right product at the right price and knowing who the right people are to sell it to.

*QUESTION:* So you put your market research into that process quite a lot?

*ANSWER:* Increasingly so, yes. Our budget for the year, whilst I won't tell you what it is, there is a disproportionate amount of research this year because that is one of the requirements we need to get a bodied information, we need to really firm up our knowledge of the market and our markets and in future years the proportion of budget devoted to research will be smaller, that is the idea. What we are doing is trying to understand what the environment claimed user group wants, what end users want to do with law, anything to do with health information, we want to understand what manufacturers want, information wise. A briefing I have just come out of was on importers, who the importers are, what information they want, at what price. So we have a lot of end user groups to research.

*QUESTION:* What sort of form does that research take? Is it talking to customers or more formal research?

*ANSWER:* We have pretty well spanned it. At one end we have put questionnaires out with product, we have also put questionnaires on the web, we have also conducted in-depth telephone interviews, we have also had focus groups running, we have also done a full test research, so I think we have covered pretty well all, and certainly a large number of the methodologies, a mixture of qualitative and quantitative, although to be honest, more qualitative really. Well no actually maybe I am wrong. It probably is a fair split between the two, but we have

certainly looked at both qualitative and quantitative and on the product basis, some is right and others are wrong.

*QUESTION:* Do you do a wider environmental analysis like economic and social trends and legal check up presumably if you have got legal changes as well?

*ANSWER:* We are not mature enough as a department to have got to that stage although yes, yesterday we decided we were going to buy a couple of publications more about the trends within the market. That is one of the downsides of not recruiting marketeers from a publishing background, people join the team, and I include myself in this, who they think they know something about marketing, but don't understand publishing. So we have to rely on some other sources, again that takes

*QUESTION:* It is interesting, some of the other marketing managers I have spoken to have actually done less of that than I thought, most of their research was located within customers and less about the wider environment.

*ANSWER:* Well we get quite a lot from the agencies we work for so, I mean the Environmental Agency for example, have some pretty specific ideas about what environmental information is required and who should be receiving it, and one of our roles is to learn from that, but also to come back and say, well actually you have publicised about a number of user groups but the truth is that two or three of these are more important than the others and maybe some of them don't exist at all. A classic case of this is the Driving Standards Agency, the Driving Standards Agency is particularly keen on producing a whole load of publications and our role has tended to be with that Agency to go back and say, following some research we can tell you that these are not flyers, cross them off the list. So I would hope that if you were to come back next year, I would be able to tell you we are doing more work looking at the overall business environment. At the moment we perceive the case to be that there is this huge opportunity there and our role is more to define and decide which bits of opportunity we are going to leverage because at the end of the day, everyone needs information, businesses need information products. We need to decide which ones we want to promote and develop and you know, that is the stage we are at.

*QUESTION:* In terms of preparing a sales and marketing plan, you were saying you inherited a particular situation, was there one done or do you plan to do one?

*ANSWER:* No, I plan to do one actually. There are two elements to this, one is that there was no marketing plan for the year but there will be for next year because we are now on board and will write one. It will be a pretty classic marketing document, it will go through the competitive analysis, there will be, we do port analysis as well as swat analysis on everything, it is certainly within the business plan. It will be a bottoms up budget so we will work things on a title by title basis, or at least it will be a pretty classic marketing plan. That's at one level, the other level is a group level, our Chief Exec is quite hot on marketing and wants there to



be an overall marketing planning document produced by all four divisions, the challenge there being the divisions are quite different, so I am currently working on one which will go out to all marketing teams and which will outline the process they should follow and give examples of the sort of output there should be. So we are going to try and do both those things this year.

*QUESTION:* So in terms of working to a process, do you plan to use or have the tools of marketing been used, things like the Boston matrix and Ansop matrix, and some of those sorts of tools?

*ANSWER:* Yes, I would say that the Boston matrix is used everywhere, in fact everything is a two by two matrix and if you turn to our business plan you would see that our business plan starts off with a quarter analysis, you know all the threats, internal, external, you would find there is quite a lot of classic marketing thinking here partly because a lot of people have come in, post-privatisation from other big companies and are just used to doing it and maybe at the end of the day, I am sure that is the case, a lot of this was done anyway, but certainly now we are doing the net present value analysis that needs to be done. We are following some of the thinking, our Chief Exec in Publishing is ex-McGrouty himself, and has therefore been responsible for producing a lot of the classic marketing techs, so he is quite keen that we should practice what we preach, so it is quite useful. So, yes it reasonably well follows the classic line and one of our opposite numbers in supplies, he is a Harvard MBA and therefore his market plan is going to look like something that comes out of Harvard, it is going to be that sort of classic document, I would hope.

*QUESTION:* Would you think there are any weaknesses with them, or is there anything that companies have to be cautious about in using them?

*ANSWER:* We don't follow them slavishly and of course we have our own ways of doing things but this is a particular environment where, because real marketing is quite a new thing, I think you can afford to go in with a pretty clean text book approach and try and apply it. If we were twenty years down the line, we wouldn't be doing things in quite the way we are, but, for my part I have read some of the theory, I have tried to practice it and for the most part I think in translating into like context it is worth doing. I certainly wouldn't sign off any major project based purely on a text book approach to something if I felt that something had been left out. One of our product marketing managers joined from a consumer background and on day 1 I sent her round with a clip board to go and check with forty students as they came out of the art college what they thought of the front cover of the new highway code which rather surprised her, but I think it was just to reinforce the point that we had done all sorts of research and the figures all look great, but at the end of the day I really wanted the people on the street to say, yes I understand what this book is all about, it is the highway code. So, we don't follow things slavishly, we certainly do question what it is we are doing, but at the end of the day, our business plan should be readily understood if read by anyone who has

ever seen a Boston matrix or has read Porter's book, all those things you will see, veins of that sort of thinking running through it.

*QUESTION:* I was talking to somebody else who was saying, well they ran it through for the first time and found it extremely useful to focus people on the sorts of things to think about, but haven't used it quite so much since, but initially in marketing they found it a very good process to go through.

*ANSWER:* Absolutely and at a micro level, when we are looking at mailshots, historically we haven't been measuring response rates, conversion rates, and we now have a plan for looking at those sorts of ratios, looking at costs per pack, looking at how much we are investing, that is text book stuff. It slightly surprises me to find that a lot of it hasn't been done before but the business imperative was not to do it because there hadn't been the requirement that we make a contribution at the end of the day, whereas there is now, because the share holders will sack us otherwise, so it is natural that we should now have it. So I encourage the team to take the diplomas and certificates in marketing and we contribute towards it because, whether or not they apply it all, they will certainly apply a portion of it and they will have the sense to apply the bits that are worth applying and the sense to regard the other bits as maybe useful in another context, but not within the publishing context. You know, there is very little marketing theory that you could ever say is just outright wrong, I think, for the most part it is a question of applying it correctly and being sensitive to the way it is used.

*QUESTION:* Because I think all the theory anyway developed from looking at companies.

*ANSWER:* A lot of it has been borne out of American experience of course and things are slightly different here. We are always debating the use of some of the classic approaches, right now the use of a PS at the end of a letter and it doesn't seem so appropriate for us, so we do look, we try and look at what the classic approach should be and maybe what is wrong with it and some of our titles, particularly the top end consumer titles, we might agree that the form of a sales letter shouldn't follow that classic structure and you know if that is appropriate we will do it.

*QUESTION:* Do you think there is a role for intuitive decision-making in management decisions or is that largely delegated to?

*ANSWER:* I think there is a role because that is how great managers manage, the Richard Bransons and, having invested in research, we have the results, or should have the results in order to make a thoroughly objective decision, that is what we are trying to do and that is especially important when you have to make 7,000 decisions a year on product, whether you launch a product or not, but at the end of the day, one of the many values of the publishing team over the way, is they have a gut feel for what is going to work and what isn't going to work and even at the micro level, looking at the cover of a book, they can sense whether it is going to

work or not, so I believe there is a role for making those sort of judgement calls, but it would make sense that we should, where there is any doubt, go with what the data tells us, rather than what we think might be right.

*QUESTION:* Perhaps looking from the customer's point of view, do you see successful sales and marketing about the classic four p's model or is there any others you think should be included?

*ANSWER:* We don't, having said that we follow the classic approach, we tend not to talk about the marketing p's, but we do actually discuss them every day, we just don't talk about them as being the p's of marketing. Product definitely, price every day, place and promotion more or less daily.

*QUESTION:* There was that point about relationships wasn't there which doesn't quite fit very easily into that sort of model?

*ANSWER:* Sorry, relationships?

*QUESTION:* Sort of relationship marketing.

*ANSWER:* I see what you mean, yes. It is quite a lot to do with the price isn't it and the product of course. There is a loyalty marketing dimension to it but I guess if you assume that the price and the product would mean that over time you would offer loyal customers a different combination of price and product, then that is included in it.

*QUESTION:* Service.

*ANSWER:* Service is and we are looking at that as well because we offer service in a number of ways, both at our own customer service desk but also through our own book shops and we do try and find out what people think of us, so I mean I made a short and extremely poor presentation in the British Library this week but one of the good things that came out of that is they told me what they thought of our customer service and it wasn't particularly glowing, so we are trying to up the ante in terms of customer service, but then we have also got the dimension of selling through the trade, so my colleague who runs sales has a substantial trade sales team and we have to offer the trade a certain sort of service and indeed marketing input which allows them to service the end user properly, so a portion of our time is spent designing quantile materials and things that the trade can use on our behalf and their own behalf. Yes I had not really thought this through before but I guess the four p's doesn't come into the service dimension, again unless you include that as being part of product. One thing we are very keen on here is talking about product meaning not just physical product but also a service, so when we are, this morning, we were talking about a particular environmental service that might be available on the internet, that is as much about content as it is about timeliness and speed and accuracy and all those sort of things, so that is part of the product definition. A lot of that is about how easy it is to get it, what do you do if things

go wrong, who do you call, how fast do you get a resolution to your problem? So, we see ourselves as selling information, not selling books, and part of the basket of information is having our service back up. We don't, now you mention it, we don't look at it in those terms but we do include that thinking in our discussion of product.

*QUESTION:* So in the marketing plan those terms aren't used?

*ANSWER:* In the marketing term you will not see the four p's. But if you look at what the plan contains you will find aspects that relate to those p's very clearly. It makes me wonder now whether perhaps I ought to, but maybe at that point it does become a bit slavish, maybe I mean I would rather talk about understanding the marketing, understanding products, understanding how you reach end users, and understanding how you continue your business as usual sales to those markets, how you get incremental sales to those markets, how you get loyalty, so during the year you have got a growing loyal customer base.

*QUESTION:* Those sorts of things are in the marketing plan?

*ANSWER:* That's right, how you deal with attrition, anti-attrition measures that sort of thing. And that is the way the marketing plan will go as opposed to say, right for each title here are the p's and this is how it is going to look.

*QUESTION:* It is interesting, I have found quite a lot of companies do do marketing plans but they are geared to the way they perceive the market rather than saying, there is this model, I must adhere to this all the time.

*ANSWER:* I am just thinking, in previous roles I have done marketing plans based on the p's but it has tended to be with companies where there is a much smaller product line, four or five key products, and you would probably go to town on them and do a lot of work on promotion etc.

*QUESTION:* It is very much easier isn't it. I know a lot of Malcolm MacDonald's examples are based on marketing plans dealing with about twelve customers, with only twelve products it is probably a lot easier.

*ANSWER:* Yes, we are starting at the other end of the spectrum where we have thousands of customers and thousands of products and just understanding who has bought what is the first thing for us, you know, one of the things we have designed in the past three or four months is a marketing database that will help us to do that, because up until then we just had lots of transactions going on, but we are now looking at who has bought what, who our best customers are, how many titles they buy, when they buy them, and it is actually pretty basic thinking which you might have expected us to have had from the year dot, which we are only now developing. I think as we have said already, the point of maturity or that of the marketing team and the point we are at is, we have just about got the right people in what we believe to be the right jobs and we have just about got the right tools,

meaning the marketing database, and the next objective for us to do the more forward thinking planning, marketing planning for next year.

*QUESTION:* I think you have covered some of the points about taking into account forces outside the organisation.

*ANSWER:* I would say on that one that one of the things we are quite hot on here is change management, it may not answer the question directly, but one of our group board members is American and is very hot on change, he is taking groups of managers off site throughout the summer for a whole week, which in my experience is a hell of a long time to take people off site for, and he is taking I don't know what number of people, let's say it is ten or fifteen, for a week at a time, just to look at change management and that, undoubtedly, is looking at what other companies have done and how they have done it and how they have transformed themselves from what they have been to what they want to be, whether that is through re-engineering the workforce or through new product or whatever, so I think more of this sort of looking outside the organisation is starting to happen with this guy's programme of change management sessions.

*QUESTION:* I suppose time is a question.

*ANSWER:* It is for us because it is a recently privatised company, there are a number of things we need to do to be credible and we have to do in order to satisfy the people who are backing us so we need to make sure, we are trying to accomplish I think in a couple of years what you could more comfortably accomplish and traditionally would have been accomplished in about five I think. We are pushing a lot of things through quite fast and that puts the pressures on the people who have been here some time and see how things used to be and how things now are, but it has to be done, and to survive as a business and professional publisher, I mean everyone wants to get into business and professional publishing, it is the high margin end of the publishing world, you know, that is warranted.

*QUESTION:* Are there any general comments you feel are perhaps important to bring out? You have covered some of the points about change there and changing direction, are there any final things you feel are particularly important and need drawing out?

*ANSWER:* I don't think so. All I would say is we are trying to follow a pretty classic approach and the way I have described the organisation would I hope be in keeping with the way a marketing manager selling computer equipment or white goods might describe his marketing team, it consists of people looking at research or communication, at developing marketing plans, it isn't just what it used to be which was churning out direct mail. So we are taking a pretty traditional approach to both the organisation and to our thinking, but we are not following slavishly, you know, we are taking the bits we think are right.

*QUESTION:* One final thing to conclude on, would it be true to say of a manager's job that a lot of the time is spend in communication and talking to other people or do you think that is an unfair representation, do you think the balance of the job is between talking to other people and spending time planning?

*ANSWER:* Our philosophy here is that managers don't just manage people and attend meetings, they have their own projects and do their own work as well and I know a few people have found that quite hard, in fact a number of people have found it impossible to operate that way, so I spend, if I am honest, the vast majority of my time between 9 and 5 in meetings and therefore discussing and talking, but I spend quite a lot of time at either end of the day doing the other work that has to be done and I have projects that I deliver myself, not that I pass down to my team and they deliver for me, and I have been assured that my managers have the same. So my manager who runs the communications team might have thought, although he didn't, that he was being recruited to manage people, and make sure the work was being done by his people, he actually has responsibility himself to do some direct mail to support clients.

*QUESTION:* So it is quite a strong task orientated culture?

*ANSWER:* It is and it has to be because we can't afford just to have the entire floor of marketing, we have got nineteen people in the marketing department, there used to be as many people doing far less, they weren't wasting their time, they were just doing more things that we have cut out, so the pressure is on and we definitely spend time working on our own and writing and thinking and planning and we don't spend all our days in meetings discussing. That is the challenge for anyone, it doesn't necessarily need to be a marketing department, but anyone managing staff, because staff quite rightly require that they are communicated with and understand what is going on and the stage I am at is a stage I have been in previously, where the role demands that things are achieved and therefore you tend to communicate less with your team than you would like and pips begin the squeak and people start to get upset about it and then you sort of do the communicating, but ultimately other things have to be done and I would expect that in a month or two's time, the communication will be more structured and maybe the rest of the people will feel happier about that. We have recently done a staff questionnaire for the whole business, not just the publishing division, and some pretty obvious things came back, one of which was communication wasn't awful, but there needs to be some more of it. So this communication about managing people I have to do, that's part of my job and there is another element of communication which is all about running marketing and I get involved in that, but we do also do a lot of work that requires one person doing one thing and delivering it.

*QUESTION:* Thanks very much.

## **APPENDIX THREE**

transcript corrected

### **STIRLING PUBLISHERS**

#### **general issues**

Wide product range - attempting to create a wider audience adopting a classic marketing approach - organisation has marketing department - with desk research, product design team + a marketing communications team and a subscription team.

Strong emphasis on relationship marketing approach - marketing director has a hands on role besides just strategic - resistance to marketing from traditional publishing teams in the organisation, they had no market focus so an internal marketing programme has been adopted - trying to turn the organisation into a marketing led organisation - marketing defined as understanding what the market wants, designing product and promoting it to end user - formal market research methods adopted and used, not a full environmental analysis undertaken, but attempts made to move in that direction - new marketing director in a company recently forced to be more business like after a major change in ownership - no marketing plan at present but there will be one a classic marketing plan to include competitive analysis - swot analysis, budgets.

Also a marketing planning policy document being worked on and the plan. But a business plan does at present incorporate the tools of marketing - (plan in preparation).

Tools cannot be followed slavishly - must be adapted to the particular environment - but useful to have theory here because it will help to embed real marketing important to have plans in order to measure what is going on marketing evaluation important as well as formal decision making methods there is a role for intuitive management 4Ps approach not used - service seen as a crucial variable - 4Ps does not cover this. Product has to encompass service. 4Ps not used in marketing plan - the latter has to be couched in terms of understanding markets - products etc

marketing database being used to facilitate a better approach -key role for change management in organisation at present latter important given recent change of ownership managers must have a hands on role communication important

#### **general meaning units**

1 challenge of privatisation change of ownership

2 marketing challenge from breadth of product list. 45,000

titles to market

3 marketing aims incorporate meeting existing needs, add in risk publishing and to add in value to existing products and to create new products under corporate brand name

4 a marketing department of nineteen trying to follow a classic marketing approach built around NPD, research product design and communications, in an industry not renowned for marketing (T2)

5 team recruited from outside the organisation to bring in a classic marketing approach

6 key role of relationship building, customer retention etc, key aspects built into future planning (T12)

7 marketing director does get involved in day to day operational issues - and other managers as well. (T22)

8 balance of work more on day to day management than longer term strategy innovation. pressure of day to day jobs. newness to role important (T22)

9 a business plan exists yet no discrete marketing plan (T11)

10 resistance to marketing element of the business plan and an internal marketing strategy used to address this issue (T18)

11 marketing defined as understanding markets - wants, designing products promoting products to end user - marketing is at the end of the day, selling (T4)

12 key role for formal market research (T4)

13 limited environmental analysis eg economic and social trends - but seen as important and growing, helps identify opportunities (T10,T5,)

14 Need to know the business as well as marketing principles - buying in information because some of the marketing team don't know publishing (T9)

15 content of business plan competitive analysis, swot analysis, budgets, Porter, product lines would also be in the projected marketing plan that is being prepared by the marketing director(T8)

16 as well as preparing marketing plan, a marketing planning policy document is also being drawn up

17 marketing planning tools used - eg Boston matrix Ansoff Porter analysis swot in business plan (T2)

18 large number of staff from classical marketing backgrounds - using conventional theories useful for initiating marketing



(rationalisation?) new team(T19)

19 classical marketing theory cannot be slavishly followed must be seen within the context of the business - classical theory important and relevant though (T2)

20 Marketing planning\marketing planning tools assist in measurement (T2)

21. marketing education as important in terms of inculcating classical theory

22 role of incremental intuitive decision making in the organisation (T15, T14, T17)

23 4Ps model does not inform the approach to marketing (T7)

24 service as a key marketing factor \product service decision enhances customer support (T1)

25 4Ps model easier with restricted number of products

26 technology in support of marketing decisions

27 change management seen as an important area of management to facilitate new methods and culture

28 management about communication as well as tasks staff feedback (Internal marketing seen as important)

### **key meaning units**

4 6 7 10 12 17 19 20 25

### **general summary**

The organisation has to be seen in the context of change, as it has recently undergone a change of ownership and moved from the public to the private sector. This accounts for the emphasis on change management issues and the focus on new ways of working. The latter appears to be partly spearheaded by a new marketing based ethos and culture carriers who see the way forward for the organisation as being about a market based approach. There is a stated emphasis on the point that the marketing department is attempting to develop and use a classical approach with the emphasis on marketing tools and theory of a traditional nature. The tools are evident in the business plan and the new marketing plan, which will be the first of its kind. Despite the emphasis on the classical approach to marketing the four Ps do not form any central element of the planning process. To have a plan is seen as being important in terms of helping to measure results and also in terms of building long term relationships; these seem to figure predominantly and thus the

planning process is about customer retention and loyalty building.

Service in this context is seen as being important. It is seen as being unrealistic to prepare a marketing plan based around the 4Ps as the organisation has a huge range of products. So whilst marketing tools and theory are seen as being relevant, the marketing director does not believe that they should be slavishly followed and the particular environmental context is seen as a significant factor in determining how marketing is implemented, even down to accepting that intuition in decision making is important, despite a big emphasis on the importance of market research. A full environmental analysis not undertaken either, although its importance is readily recognised. Internal marketing is used consistent with the context of an organisation undergoing change. The important point is made that it is not sufficient to know marketing, one also has to know the business as well. Management is perceived not only to be about managing staff, but 'doing' the work as well; and there is an emphasis on managers being involved in tasks themselves. Technology is seen as an important aspect of support for marketing, in terms of a newly developed customer database. Resistance to marketing has been experienced from employees involved in publishing. Internal marketing has been addressing this and it could be possible to see the new marketing team with their belief in universal marketing theory as an ideological resource, being used by organisational leaders to turn the organisation round. Sending staff on external marketing courses is also about achieving the aim of raising knowledge about marketing theory. Marketing is itself defined in fairly classical terms eg, understanding wants designing and promoting products but it is at the end of the day, seen as being about selling by the marketing director. Conventional tools recognised and currently being used in the business plan includes matrix (Ansoff\Boston) swot analysis and Porter.

**PLEASE NOTE THAT:**

**NO GENERAL MEANING UNIT NUMBERS, OR THEME NUMBERS HAVE BEEN INCLUDED ON THE TRANSCRIPT IN THIS APPENDIX AND THAT IT IS AN UNCORRECTED COPY.**

**Ardley, Barry**

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**From:** MARGS2203@aol.com[SMTP:MARGS2203@aol.com]  
**Sent:** 09 January 2001. 18:47  
**To:** Ardley, Barry  
**Subject:** I hope this is OK, and what you wanted

Having conducted a review of the interviews, I can identify and confirm that a clear number of themes were in evidence from the variety of transcripts. Each theme was acknowledged and discussed within the summary.

M. Salih

**Ardley, Barry**

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**From:** Simon Graver[SMTP:simon@18milered.fsnet.co.uk]  
**Sent:** 16 January 2001 00:37  
**To:** Ardley, Barry  
**Subject:** taco bell were the only corporation to survive the franchise wars

barry  
hope this is what you wanted, if not you know where to find me...

Overall, there was a consistency between the general themes I identified in the transcripts and those which were identified by the person undertaking the research.

Simon Graver

take it easy  
simon :)